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Record Series #	Record Name	Retention	Remarks
GR1000-01a	AGENDAS; OPEN MEETINGS; 1). IF THE MINUTES DESCRIBE EACH MATTER CONSIDERED BY THE GOVERNING BODY AND REFERENCE TO AN AGENDA IS NOT REQUIRED.	2 YEARS	
GR1000-03a	WRITTEN MINUTES.	PERMANENT	
GR1000-03b	NOTES TAKEN DURING MEETINGS FROM WHICH WRITTEN MINUTES ARE PREPARED.	90 DAYS AFTER APPROVAL OF MINUTES BY THE GOVERNING BODY	
GR1000-03g	MINUTES; SUPPORTING DOCUMENTATION - ONE COPY OF EACH DOCUMENT OF ANY TYPE SUBMITTED TO A MEETING OF A GOVERNING BODY FOR CONSIDERATION, APPROVAL, OR OTHER ACTION; IF SUCH ACTION IS REFLECTED IN THE MINUTES OF THE MEETING.	2 YEARS	
GR1000-21b	AFFIDAVITS OF PUBLICATION, INCLUDING ANY ACCOMPANYING CLIPPING PROOFS OR TEAR SHEETS; ELECTION NOTICES; 1). IN AN ELECTION INVOLVING A FEDERAL OFFICE.	ELECTION DAY + 22 MONTHS	
GR1000-25	CONTRACTS, LEASES, AND AGREEMENTS, INCLUDING REPORTS, CORRESPONDENCE, PERFORMANCE BONDS, CERTIFICATES OF LIABILITY, AND SIMILAR RECORDS RELATING TO THEIR NEGOTIATION, ADMINISTRATION, RENEWAL	4 YEARS AFTER THE EXPIRATION OR TERMINATION OF THE INSTRUMENT ACCORDING TO ITS TERMS	
GR1000-26a	ADMINISTRATIVE - INCOMING/OUTGOING AND INTERNAL CORRESPONDENCE PERTAINING TO THE FORMULATION, PLANNING, IMPLEMENTATION, MODIFICATION, OR REDEFINITION OF THE PROGRAMS...	5 YEARS	Revised item
GR1000-26b	GENERAL - INCOMING/OUTGOING AND INTERNAL CORRESPONDENCE PERTAINING TO THE REGULAR OPERATION OF THE POLICIES, PROGRAMS, SERVICES, OR PROJECTS OF A LOCAL GOVERNMENT...	2 YEARS	
GR1000-26c	ROUTINE - CORRESPONDENCE AND INTERNAL MEMORANDA SUCH AS LETTERS OF TRANSMITTAL, REQUESTS FOR PUBLICATIONS, INTERNAL MEETING NOTICES, AND SIMILAR ROUTINE MATTERS ...	AV	
GR1000-29	LIABILITY, THEFT, FIRE, HEALTH, LIFE, AUTOMOBILE, AND OTHER POLICIES FOR LOCAL GOVERNMENT PROPERTY AND PERSONNEL INCL. SUPPORTING DOCUMENTATION RELEVANT TO THE IMPLEMENTATION, MODIFICATION, RENEWAL, OR REPLACEMENT OF POLICIES	4 YEARS AFTER THE EXPIRATION OR TERMINATION OF THE POLICY ACCORDING TO ITS TERMS AND ALL RIGHTS GRANTED UNDER IT	
GR1000-30	FORMAL LEGAL OPINIONS RENDERED BY COUNSEL OR THE ATTORNEY GENERAL FOR A LOCAL GOVERNMENT, INCLUDING ANY WRITTEN REQUESTS FOR OPINIONS, CONCERNING THE GOVERNANCE AND ADMINISTRATION OF A LOCAL GOVERNMENT.	PERMANENT	
GR1000-31	LITIGATION CASE FILES.	AV AFTER DECISION OF LOCAL GOVERNMENT NOT TO FILE LAWSUIT OR DECISION THAT LAWSUIT WILL NOT BE FILED AGAINST IT; DISMISSAL OF A LAWSUIT FOR WANT OF PROSECUTION OR ON MOTION OF PLAINTIFF; OR FINAL DECISION OF COURT	

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Record Series #	Record Name	Retention	Remarks
GR1000-37	PHOTOGRAPHS, PHOTOGRAPHIC SCRAPBOOKS, SLIDES, SOUND RECORDINGS, VIDEOTAPES, POSTERS, AND OTHER NON-TEXTUAL MEDIA THAT DOCUMENT THE HISTORY AND ACTIVITIES OF A LOCAL GOVERNMENT	AV	
GR1000-37	PHOTOGRAPHS, PHOTOGRAPHIC SCRAPBOOKS, SLIDES, SOUND RECORDINGS, VIDEOTAPES, POSTERS, AND OTHER NON-TEXTUAL MEDIA THAT DOCUMENT THE HISTORY AND ACTIVITIES OF A LOCAL GOVERNMENT...	PERMANENT FOR HISTORICAL REASONS	
GR1000-38	EXECUTIVE ORDERS, DIRECTIVES, MANUALS AND SIMILAR DOCUMENTS THAT ESTABLISH AND DEFINE POLICIES, PROCEDURES, RULES AND REGULATIONS GOVERNING OPERATIONS/ACTIVITIES OF LOCAL GOVERNMENT AS A WHOLE	US, EXPIRED OR DISCONTINUED + 5 YEARS	
GR1000-39	PAMPHLETS, REPORTS, STUDIES, PROPOSALS, AND SIMILAR MATERIAL PRINTED BY OR FOR A LOCAL GOVERNMENT OR ANY OF ITS DEPARTMENTS, SUBDIVISIONS, OR PROGRAMS AND DISTRIBUTED TO OR INTENDED FOR DISTRIBUTION TO THE PUBLIC	ONE COPY OF EACH PERMANENT	
GR1000-39	PAMPHLETS, REPORTS, STUDIES, PROPOSALS, AND SIMILAR MATERIAL PRINTED BY OR FOR A LOCAL GOVERNMENT OR ANY OF ITS DEPARTMENTS, SUBDIVISIONS, OR PROGRAMS AND DISTRIBUTED TO OR INTENDED FOR DISTRIBUTION TO THE PUBLIC	DISPOSE AT OPTION	
GR1000-41a	ANNUAL, SUB-ANNUAL, OR IRREGULARLY PREPARED REPORTS, PERFORMANCE AUDITS, OR PLANNING STUDIES SUBMITTED TO THE GOVERNING, 1). ANNUAL REPORTS.	PERMANENT	
GR1000-41a	ANNUAL, SUB-ANNUAL, OR IRREGULARLY PREPARED REPORTS, PERFORMANCE AUDITS, OR PLANNING STUDIES SUBMITTED TO THE GOVERNING, 2). SPECIAL REPORTS OR STUDIES PREPARED BY ORDER OR REQUEST OF GOVERNING BODY	PERMANENT	
GR1000-41a	ANNUAL, SUB-ANNUAL, OR IRREGULARLY PREPARED REPORTS, PERFORMANCE AUDITS, OR PLANNING STUDIES SUBMITTED TO THE GOVERNING, 5). WORKING PAPERS AND RAW DATA USED TO CREATE ANY REPORT FOR (1) AND (2) ABOVE.	3 YEARS	
GR1000-41b	ACTIVITY REPORTS COMPILED ON A DAILY OR OTHER PERIODIC BASIS PERTAINING TO WORKLOAD MEASURES, TIME STUDIES, NUMBER OF PUBLIC CONTACTS, ETC., EXCEPT REPORTS OF SIMILAR TYPES NOTED IN THIS OR OTHER COMMISSION SCHEDULES.	1 YEAR	
GR1025-01a	RECORDS OF FISCAL AUDITS CONDUCTED BY INTERNAL OR EXTERNAL AUDITORS; ANNUAL, BIENNIAL, OR OTHER PERIODIC AUDIT OF ANY DEPARTMENT, FUND, ACCOUNT, OR ACTIVITY OF A LOCAL GOVERNMENT.	PERMANENT	
GR1025-02	RECORDS DOCUMENTING THE PLEDGING OF BONDS OR SECURITIES BY BANKS SERVING AS DEPOSITORIES FOR PUBLIC FUNDS INCLUDING DEPOSITORY CONTRACTS, SECURITY PLEDGES AND STATEMENTS, SURETY BONDS AND SIMILAR RECORDS.	4 YEARS AFTER TERMINATION, EXPIRATION OR RELEASE OF CONTRACTUAL OBLIGATIONS	
GR1025-03a	BOND ADMINISTRATIVE RECORDS CONSISTING OF PRELIMINARY STUDIES, PROPOSALS AND PROSPECTUSES, AUTHORIZATIONS AND CERTIFICATIONS FOR ISSUANCE OR CANCELLATION, AND RELATED POLICY CORRESPONDENCE.	PERMANENT	
GR1025-03b	BOND CERTIFICATES AND REDEEMED COUPONS.	1 YEAR AFTER PAYMENT	

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Record Series #	Record Name	Retention	Remarks
GR1025-04a	ANNUAL BUDGETS (INCLUDING AMENDMENTS).	PERMANENT	
GR1025-04c	WORKING PAPERS CREATED EXCLUSIVELY FOR THE PREPARATION OF BUDGETS, INCLUDING BUDGET REQUESTS, JUSTIFICATION STATEMENTS AND SIMILAR DOCUMENTS.	3 YEARS	
GR1025-07a	ANNUAL, SUB-ANNUAL, OR IRREGULARLY PREPARED FINANCIAL REPORTS OR STATEMENTS ON THE ACCOUNTS, FUNDS, OR PROJECTS OF A LOCAL GOVERNMENT CREATED; MONTHLY, BIMONTHLY, QUARTERLY, SEMI-ANNUAL REPORTS.	FE + 3 YEARS	
GR1025-08a	SUCCESSFUL GRANT APPLICATIONS AND PROPOSALS AND ANY DOCUMENTATION THAT MODIFIES THE TERMS OF A GRANT.	FE + 5 YEARS	
GR1025-08b	FINANCIAL, PERFORMANCE AND COMPLIANCE REPORTS SUBMITTED TO GRANTOR OR SUB-GRANTOR AGENCIES.	FE + 5 YEARS	
GR1025-09a	DOCUMENTATION RELATED TO THE INVESTMENT OF PUBLIC FUNDS (e.g., CERTIFICATES OF DEPOSIT) THAT EVIDENCES THE INVESTMENT OF FUNDS, THE PERFORMANCE OR RETURN OF INVESTMENTS, THE CANCELLATION OR WITHDRAWAL OF INVESTMENTS...	FE + 5 YEARS	
GR1025-26a	CLAIMS, INVOICES, COPIES OF CHECKS AND PURCHASE ORDERS, EXPENDITURE AUTHORIZATIONS AND SIMILAR RECORDS THAT SERVE TO DOCUMENT DISBURSEMENT, INCLUDING THOSE DOCUMENTING CLAIMS FOR AND REIMBURSEMENT TO EMPLOYEES FOR TRAVEL...	FE OF DATE OF PAYMENT + 5 YEARS	
GR1025-26c	REPORTS ACCOMPANYING TRANSMITTAL OF FUNDS TO FEDERAL, STATE, OR OTHER LOCAL GOVERNMENT AGENCIES (e.g., SALES TAX TO THE STATE COMPTROLLER OF PUBLIC ACCOUNTS), TO RETIREMENT SYSTEMS OR TO OTHER ENTITIES...	FE OF PERIOD COVERED BY REPORT + 3 YEARS	
GR1025-27a	BILL COPIES OR STUBS, STATEMENTS, BILLING REGISTERS, ACCOUNT CARDS, DEPOSIT WARRANTS, CASH RECEIPTS, CREDIT CARD RECEIPTS, RECEIPT BOOKS, CASH TRANSFERS, DAILY CASH REPORTS, CASH DRAWER RECONCILIATIONS	FE OF DATE OF RECEIPT + 5 YEARS	
GR1025-27a	BILL COPIES OR STUBS, STATEMENTS, BILLING REGISTERS, ACCOUNT CARDS, DEPOSIT WARRANTS, CASH RECEIPTS, CREDIT CARD RECEIPTS, RECEIPT BOOKS, CASH TRANSFERS, DAILY CASH REPORTS (SHARS, MEDICAID, MAC REPORTS	FE OF DATE OF RECEIPT + 7 YEARS	
GR1025-27e	RECORDS OF ACCOUNTS DEEMED UNCOLLECTABLE, INCLUDING WRITE-OFF AUTHORIZATIONS.	FE OF WRITE OFF DATE + 5 YEARS	
GR1025-28	BANK STATEMENTS, CREDIT CARD STATEMENTS, CANCELLED CHECKS, CHECK REGISTERS, DEPOSIT SLIPS, DEBIT AND CREDIT NOTICED, RECONCILIATIONS, NOTICES OF INTEREST EARNED, MONETARY TRANSPORT RECORDS (INCLUDING ARMORED CAR PICKUP LOGS).	FE + 5 YEARS	
GR1025-30a	GENERAL LEDGER SHOWING RECEIPTS AND EXPENDITURES FROM ALL ACCOUNTS AND FUNDS OF A LOCAL GOVERNMENT; 1). FOR FISCAL YEARS FOR WHICH AN ANNUAL FINANCIAL AUDIT REPORT (SEE ITEM NUMBER GR1025-01) EXISTS.	FE + 5 YEARS	

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Record Series #	Record Name	Retention	Remarks
GR1025-30b	SUBSIDIARY LEDGERS.	FE + 5 YEARS	
GR1025-30c	RECEIPT, DISBURSEMENT, GENERAL OR SUBSIDIARY JOURNALS.	FE + 5 YEARS	
GR1025-30d	JOURNAL VOUCHERS AND ENTRIES OR SIMILAR POSTING CONTROL FORMS (INCLUDING SUPPORTING DOCUMENTATION SUCH AS CORRESPONDENCE AND AUDITOR ADJUSTMENTS THAT EVIDENCE JOURNAL ENTRIES AND AMENDMENTS).	FE + 5 YEARS	
GR1050-08a	EMPLOYEE BENEFIT PLANS SUCH AS PENSION; LIFE, HEALTH AND DISABILITY INSURANCE; SENIORITY AND MERIT SYSTEMS AND DEFERRED COMPENSATION PLANS, INCLUDING AMENDMENTS.	TERMINATION OF PLAN + 1 YEAR	
GR1050-08b	ENROLLMENT FORMS PROVIDING PERSONAL IDENTIFYING DATA, BENEFICIARY INFORMATION, OPTION; 2). IF THE OFFICIAL RECORD IS MAINTAINED BY THE LOCAL GOVERNMENT; B). LIFE, HEALTH, ACCIDENTAL DEATH, AND DISABILITY INSURANCE	TERMINATION OF COVERAGE + 4 YEARS	
GR1050-12	SUMMARY EMPLOYMENT HISTORY RECORD FOR EACH EMPLOYEE MAINTAINED ON ONE OR MORE FORMS, CONTAINING THE FOLLOWING MINIMUM INFORMATION; NAME; SEX; DATE OF BIRTH; SOCIAL SECURITY NUMBER; POSITIONS HELD WITH DATES OF HIRE...	PERMANENT	Revised item
GR1050-14a	APPLICATIONS, TRANSCRIPTS, LETTERS OF REFERENCE, AND SIMILAR DOCUMENTS WHOSE SUBMISSION BY CANDIDATES FOR VACANT POSITIONS (BOTH HIRED AND NOT HIRED) OR FOR PROMOTION, TRANSFER, OR TRAINING OPPORTUNITY...	2 YEARS FROM THE CREATION (OR RECEIPT) OF THE RECORD OR THE PERSONNEL ACTION INVOLVED, WHICHEVER IS LATER	
GR1050-15a	CONTRACTS AND AGREEMENTS, INCLUDING COLLECTIVE BARGAINING AGREEMENTS, BETWEEN A LOCAL GOVERNMENT AND AN EMPLOYEE OR A GROUP OF EMPLOYEES, INCLUDING WRITTEN ACCEPTANCES OF SUCH CONTRACTS.	LAST EFFECTIVE DATE OF CONTRACT + 4 YEARS	
GR1050-20	RECORDS RELATING TO THE REVIEW OF EMPLOYEE GRIEVANCES AGAINST PERSONNEL POLICIES, WORKING CONDITIONS, ETC.	FINAL DECISION ON THE GRIEVANCE + 2 YEARS	
GR1050-22a	HEALTH, PHYSICAL OR PSYCHOLOGICAL EXAMINATION REPORTS OR CERTIFICATES OF ALL JOB APPLICANTS IF PHYSICAL OR PSYCHOLOGICAL CONDITION IS A FACTOR IN HIRING DECISIONS, INCL. THE PROMOTION, TRANSFER OR SELECTION FOR TRAINING...	2 YEARS FROM THE DATE OF THE DATE OF CREATION OR PERSONNEL ACTION INVOLVING, WHICHEVER IS LATER	
GR1050-22d	RECORDS OF CONTROLLED SUBSTANCES AND ALCOHOL USE AND TESTING; 2). RECORDS RELATING TO THE ALCOHOL AND CONTROLLED SUBSTANCES COLLECTION PROCESS.	2 YEARS	
GR1050-23	ANY OATHS OR AFFIRMATIONS REQUIRED OF LOCAL GOVERNMENT EMPLOYEES OR OFFICERS. INCLUDES THE STATEMENT OF ELECTED OFFICER (SECRETARY OF STATE FORM 2201).	US + 5 YEARS	
GR1050-29	UNEMPLOYMENT COMPENSATION CLAIMS FILE, PERTINENT CORRESPONDENCE AND SIMILAR RECORDS DOCUMENTING UNEMPLOYMENT COMPENSATION CASES.	AFTER CLOSED + 5 YEARS	

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Record Series #	Record Name	Retention	Remarks
GR1050-32a	RECORDS OF ACCIDENTS TO OR JOB-RELATED ILLNESSES OF EMPLOYEES; INITIAL AND SUPPLEMENTAL INCIDENT FORMS, REPORTS, OR LOGS.	CE + 5 YEARS	
GR1050-36	CRIMINAL HISTORY CHECK USED FOR CONDITION OF OR IN CONJUNCTION WITH EMPLOYMENT APPLICATION.	END OF EMPLOYEE'S PROBATIONARY PERIOD OR AFTER IMMEDIATE PURPOSE HAS BEEN FULFILLED, AS APPLICABLE	
GR1050-50	DOCUMENTATION USED TO START, MODIFY OR STOP ALL VOLUNTARY OR REQUIRED DEDUCTIONS FROM PAYROLL, INCLUDING ORDERS OR GARNISHMENT OR OTHER COURT-ORDERED ATTACHMENTS.	4 YEARS AFTER SEPARATION	
GR1050-51	DIRECT DEPOSIT APPLICATIONS/AUTHORIZATIONS.	US OR DATE OF SEPARATION, AS APPLICABLE	
GR1050-52a	A RECORD CONTAINING THE FOLLOWING PAYROLL INFORMATION ON EACH EMPLOYEE; NAME, LAST KNOWN ADDRESS AND SOCIAL SECURITY NUMBER, AMOUNT OF WAGES PAID TO THE EMPLOYEE FOR EACH PAYROLL PERIOD, INCLUDING ALL DEDUCTIONS...	5 YEARS	
GR1050-52b	A RECORD CONTAINING THE FOLLOWING MINIMUM PENSION AND DEFERRED COMPENSATION INFORMATION ON EACH EMPLOYEE; NAME, DATE OF BIRTH, SOCIAL SECURITY NUMBER, AND AMOUNT OF PENSION AND DEFERRED COMPENSATION DEDUCTIONS.	PERMANENT	Revised item
GR1050-52c	MASTER PAYROLL REGISTER, INCLUDING YEAR-TO-DATE REGISTERS, IF NOT USED TO SATISFY EITHER OF THE RETENTION REQUIREMENTS SET IN (a) OR (b).	FE + 5 YEARS	
GR1050-52f	PAYROLL ADJUSTMENT RECORDS, INCLUDING TRANSACTION REGISTERS, AUTHORIZATIONS AND SIMILAR RECORDS AUTHORIZING AND DETAILING ADJUSTMENTS TO PAYROLL RECORDS BECAUSE OF OVERPAYMENT, UNDERPAYMENT, ETC.	FE + 5 YEARS	
GR1050-53a	FORMS USED TO DETERMINE WITHHOLDING FROM WAGES AND SALARIES FOR PAYROLL TAX PURPOSES (W-4 FORMS).	4 YEARS AFTER SEPARATION OR 4 YEARS AFTER FORM AMENDED, WHICHEVER SOONER	
GR1050-53b	FORMS AND REPORTS USED TO REPORT THE COLLECTION, DISTRIBUTION, DEPOSIT AND TRANSMITTAL OF PAYROLL OR UNEMPLOYMENT TAXES (W-2, 1099).	4 YEARS AFTER TAX DUE DATE OR DATE TAX PAID, WHICHEVER LATER	
GR1050-54b	REQUESTS AND AUTHORIZATIONS FOR VACATION, COMPENSATORY, SICK, FAMILY AND MEDICAL LEAVE ACT (FMLA), AND OTHER TYPES OF AUTHORIZED LEAVE, AND SUPPORTING DOCUMENTATION.	FE + 5 YEARS	
GR1050-54c	LEAVE OR HOURS-TO-DATE REGISTERS.	FE + 5 YEARS	
GR1050-55a	DOCUMENTS USED BY PAYROLL OFFICERS TO CREATE OR CHANGE INFORMATION IN THE PAYROLL RECORDS OF INDIVIDUAL EMPLOYEES...; DOCUMENTS CONCERNING HIRING, TERMINATION, TRANSFER, PAY GRADE, POSITION OF JOB TITLE, NAME CHANGES, ETC.	2 YEARS FROM THE DATE OF CREATION OR PERSONNEL ACTION INVOLVED, WHICHEVER IS LATER	

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Record Series #	Record Name	Retention	Remarks
GR1050-56	TIME CARDS OR SHEETS, INCLUDING WORK SCHEDULES AND DOCUMENTATION EVIDENCING ADHERENCE TO OR DEVIATION FROM NORMAL HOURS FOR THOSE EMPLOYEES WORKING ON FIXED SCHEDULES.	4 YEARS	
GR1050-59a	IF WAGE OR SALARY RATE FOR EACH POSITION LISTED ON AN EMPLOYEE SERVICE RECORD (SEE GR1050-12) IS EXPRESSED IN DOLLARS.	2 YEARS AFTER LAST EFFECTIVE DATE	
GR1075-01a	SUCCESSFUL BIDS AND REQUESTS FOR PROPOSALS, INCLUDING INVITATIONS TO BID, BID BONDS AND AFFIDAVITS, BID SHEETS AND SIMILAR SUPPORTING DOCUMENTATION.	FE OF AWARD + 5 YEARS	
GR1075-03a	PURCHASE ORDERS, REQUISITIONS AND RECEIVING REPORTS.	FE + 5 YEARS	
GR1075-03b	PURCHASING LOGS, REGISTERS, OR SIMILAR RECORD PROVIDING A CHRONOLOGICAL RECORD OF PURCHASE ORDERS ISSUED, ORDERS RECEIVED AND SIMILAR DATA ON PROCUREMENT STATUS.	FE + 3 YEARS	
GR1075-16a	RECORDS CONCERNING THE PLANNING, DESIGN, CONSTRUCTION, CONVERSION, OR MODERNIZATION OF LOCAL GOVERNMENT-OWNED FACILITIES, STRUCTURES (i.e. ELECTRICAL LINES, UNDERGROUND WATER LINES), AND SYSTEMS, INCLUDING FEASIBILITY…	PERMANENT	Revised item
GR1075-19	REQUESTS OR WORK ORDER FOR REPAIRS OR MAINTENANCE TO FACILITIES, VEHICLES, OR EQUIPMENT.	2 YEARS	
GR1075-20a	REPORTS OF USAGE OF FACILITIES, VEHICLES, AND EQUIPMENT; ANY TYPE OF USAGE REPORT (MILEAGE, FUEL CONSUMPTION, COPIES RUN) IF SUCH REPORTS ARE THE BASIS FOR ALLOCATING COSTS, FOR DETERMINING PAYMENT UNDER RENTAL AGREEMENTS	FE + 5 YEARS	
GR1075-41a	REGISTERS OR LOGS OF TELEPHONE CALLS AND FAX TRANSMISSIONS MADE AND SIMILAR ACTIVITY REPORTS; IF THE LOG, REPORT, OR SIMILAR RECORD IS USED FOR COST ALLOCATION PURPOSES.	FE + 5 YEARS	
GR1075-42	E-RATE IS SCHOOLS AND LIBRARIES PROGRAM OF UNIVERSAL SERVICE FUND THAT PROVIDES; ALL RECORDS RELATED TO THE APPLICATION FOR, RECEIPT, AND DELIVERY OF DISCOUNTED TELECOMMUNICATIONS AND OTHER SUPPORTED SERVICE.	FE + 10 YEARS	
TX2975-02	APPRAISAL CARDS (PROPERTY RECORD CARDS); (b) TAXING UNITS.	AV	
TX2975-12	PROPERTY OWNERS, ALPHABETICAL INDEX OF.	US	
TX3000-05b	DELINQUENT TAX ROLLS; IF RECORD OF PAYMENT IS ENTERED IN THIS RECORD, BUT IS NOT ENTERED IN THE TAX ROLL OR A REGISTER OF TAXES COLLECTED (SEE TX3000-18) FOR THE TAX YEAR FOR WHICH THE TAX WAS DELINQUENT.	REAL PROPERTY ROLLS - 20 YEARS	
TX3000-09	TAX BILLS OR STATEMENTS, CURRENT, DELINQUENT, SPECIAL VALUATION ROLLBACK AND SPECIAL ASSESSMENT LEVY TAX BILLS OR NOTICES.	AV	

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TX3000-11a	TAX COLLECTION, DELINQUENCY, AND PROPERTY VALUE REPORTS, REPORTS TO GOVERNING BODY OF TAXING UNITS; 1). MONTHLY.	FE + 3 YEARS	
TX3000-11a	TAX COLLECTION, DELINQUENCY, AND PROPERTY VALUE REPORTS, REPORTS TO GOVERNING BODY OF TAXING UNITS; 3). ANNUAL.	PERMANENT	
TX3000-16	TAX RECEIPTS, COPIES OR STUBS OF RECEIPTS ISSUED FOR THE PAYMENT OF CURRENT OR DELINQUENT PROPERTY TAXES, SPECIAL ASSESSMENTS, OR FOR REDEMPTION OF REAL PROPERTY SOLD AT A TAX SALE, INCLUDING THOSE FOR SPLIT, PARTIAL	FE + 3 YEARS	
TX3000-17	PROPERTY TAX COLLECTION RECORDS, TAX REFUND, APPLICATIONS FOR.	FE + 3 YEARS	
TX3000-18	CONSOLIDATED TAX ROLL AND ANY SUPPLEMENTAL TAX ROLL FOR BOTH RENDERED AND UNRENDERED PROPERTY FOR EACH TAX YEAR OR, IF A CONSOLIDATED TAX ROLL IS NOT MAINTAINED, ALL COMPONENT TAX ROLLS FOR EACH TAX YEAR	REAL PROPERTY ROLLS - 20 YEARS	
EL3100-10a	SIGNATURE ROSTERS; COMBINATION FORMS; PROVISIONAL BALLOT LISTS; PROVISIONAL BALLOTS AFFIDAVIT ENVELOPES; SUMMARIES OF PROVISIONAL BALLOTS CAST; 1). IN AN ELECTION INVOLVING A FEDERAL OFFICE.	ELECTION DAY + 22 MONTHS	
EL3125-02a	APPLICATIONS AND ANY ACCOMPANYING PETITIONS FOR PLACE ON BALLOT, INCLUDING REJECTION NOTICES OR WITHDRAWAL OF PETITION SIGNATURE REQUESTS.	ELECTION DAY + 2 YEARS	
SD3200-01a	THE ACADEMIC ACHIEVEMENT RECORD OR ITS EQUIVALENT USED TO RECORD ACADEMIC ACHIEVEMENTS IN GRADES 9-12.	PERMANENT	
SD3200-01b	CUMULATIVE RECORDS OF ACHIEVEMENT IN GRADES PK-8.	DATE OF WITHDRAWAL + 5 YEARS	
SD3200-04	ENROLLMENT OR REGISTRATION FORMS USED TO ENROLL OR REGISTER STUDENTS.	US OR DATE OF WITHDRAWAL + 5 YEARS	
SD3200-05	SURVEY ADMINISTERED TO EACH STUDENT TO ESTABLISH THE STUDENT'S LANGUAGE CLASSIFICATION FOR DETERMINING WHETHER THE SCHOOL DISTRICT IS REQUIRED TO PROVIDE BILINGUAL EDUCATION OR ENGLISH AS A SECOND LANGUAGE PROGRAM.	DATE OF WITHDRAWAL + 5 YEARS	
SD3200-07	PARENTAL CONSENTS FOR A STUDENT TO ENGAGE IN SCHOOL ACTIVITIES OR PROGRAMS, EXCEPT CONSENTS NOTED ELSEWHERE IN THIS SCHEDULE.	UNTIL CESSATION OF ACTIVITY FOR WHICH CONSENT GRANTED + 2 YEARS: OR, IF ANNUALLY RENEWABLE, US + 2 YEARS	
SD3200-09a	REPORTS OF RESULTS OF TAAS, TEAMS, TABS, TAKS, STAAR, AND OTHER STANDARDIZED STATE AND NATIONAL ACHIEVEMENT, MENTAL ABILITIES, AND APTITUDE TESTS REPORTED BY SCORE, PERCENTILE RANK, ETC.	1 YEAR AFTER RECORDING OF DATA IN THE ACADEMIC ACHIEVEMENT OR CUMULATIVE RECORD	
SD3200-09b	REPORTS OF RESULTS OF OTHER TESTS OR MEASUREMENTS (e.g., READING/MATHEMATICS PROFILES).	DATE OF WITHDRAWAL + 5 YEARS	

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SD3200-09c	DISTRICT SUMMARIES ON A GROUP BASIS OF THE RESULTS OF STANDARDIZED TESTING.	3 YEARS	
SD3200-09d	TESTING ADMINISTRATION RECORDS MAY INCLUDE BUT NOT LIMITED TO, TESTING IRREGULARITY AND INVESTIGATIONS DOCUMENTATION, INVENTORY AND SHIPPING RECORDS, SIGNED SECURITY OATHS FOR TESTING PERSONNEL, AND SEATING CHARTS.	DATE TEST ADMINISTERED + 5 YEARS	
SD3225-02a	DOCUMENTATION OF REQUEST FROM AND DISCLOSURES TO THE PARENT OR ELIGIBLE STUDENT, TO AN OFFICIAL OF THE DISTRICT FOR WHAT THE DISTRICT HAS DETERMINED ARE LEGITIMATE EDUCATIONAL INTEREST, TO A PARTY WITH WRITTEN CONSENT...	DATE RECORDS PRODUCED + 1 YEAR	
SD3225-04	REQUEST FROM PARENTS OR ELIGIBLE STUDENTS TO AMEND STUDENT RECORD, NOTICES BY THE DISTRICT OF DENIAL OR CONSENT TO AMENDMENTS, REQUESTS FOR HEARING ON DENIED REQUESTS, HEARING NOTICES, AND WRITTEN DECISIONS	DATE OF FINAL RESOLUTION + 2 YEARS	
SD3250-02	RECORDS OF EACH STUDENT REFERRED TO OR RECEIVING SPECIAL EDUCATION SERVICES, INCLUDING REFERRAL, ASSESSMENT, AND REEVALUATION REPORTS; ENROLLMENT AND ELIGIBILITY FORMS; ADMISSION, REVIEW, AND DISMISSAL (ARD)	CESSATION OF SERVICES + 7 YEARS (PROVIDED STUDENT INFORMATION IS CONTAINED IN THE ACADEMIC ACHIEVEMENT RECORD FOR GRADES 9-12; AND PRIOR TO DESTRUCTION, ELIGIBLE STUDENT OR PARENTS ARE NOTIFIED)	
SD3250-16	RECORDS OF EACH STUDENT REFERRED TO OR RECEIVING SERVICES IN A GIFTED/TALENTED PROGRAM, INCLUDING NOMINATION AND OBSERVATION DOCUMENTATION, TESTING RESULTS, PARENTAL CONSENTS, COMMITTEE REPORTS AND RECOMMENDATIONS	CESSATION OF SERVICES + 5 YEARS	
SD3250-20	RECORDS OF EACH STUDENT REFERRED TO OR RECEIVING SERVICES UNDER SECTION 504, INCLUDING REFERRAL, PRE-PLACEMENT, AND REEVALUATION REPORTS, PARENTAL NOTICES; GROUP AND IMPARTIAL HEARING DELIBERATIONS	CESSATION OF SERVICES + 5 YEARS (IF AN AUDIT IS PENDING WHERE EXPENDITURES OR STUDENT ELIGIBILITY IS IN QUESTION, RETAIN UNTIL SETTLED)	
SD3250-36	RECRUITER LOGS, QUESTIONNAIRES, AND SIMILAR RECORDS DOCUMENTING EFFORTS OF RECRUITERS TO IDENTIFY AND ENROLL CURRENTLY AND FORMERLY MIGRANT STUDENTS.	10 YEARS	
SD3250-43a	FEDERAL IMPACT AID SURVEY FORMS DETERMINED TO BE ELIGIBLE AND USED TO COMPLETE DISTRICT APPLICATIONS FOR SCHOOL ASSISTANCE IN FEDERALLY AFFECTED AREAS.	5 YEARS	
SD3275-01a	CORRESPONDENCE TO AND FROM PARENT OR GUARDIANS CONCERNING ABSENCES AND TARDINESS.	AV	
SD3275-01b	CORRESPONDENCE WITH LAW ENFORCEMENT OR OTHER AGENCIES CONCERNING VIOLATIONS OF THE COMPULSORY SCHOOL ATTENDANCE LAW, INCLUDING ALL ASSOCIATED DOCUMENTATION.	2 YEARS	

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Record Series #	Record Name	Retention	Remarks
SD3275-01c	ATTENDANCE OFFICER'S LOGS AND REPORTS USED TO TRACK ACTIVITIES RELATED TO STUDENT ATTENDANCE AND ABSENCES, INCLUDING CONTACTS WITH PARENTS AND GUARDIANS.	2 YEARS	
SD3275-01d	DOCUMENTS RELATING TO STUDENT ATTENDANCE HEARINGS AND APPEALS.	DATE OF DECISION + 2 YEARS	
SD3275-02a	COPIES OF ATTENDANCE AND ENROLLMENT REPORTS SUBMITTED TO THE TEXAS EDUCATION AGENCY INCLUDING THOSE TERM AND PERIOD REPORTS SUBMITTED TO THE SUPERINTENDENT BY PRINCIPALS FOR THE PURPOSES OF COMPILING STATE-MANDATED REPORTS.	5 YEARS	
SD3275-02b	DAILY REGISTERS OF PUPIL ATTENDANCE (OR AN EQUIVALENT LOCALLY-DESIGNED RECORD) AND SIMILAR DAILY OR PERIODIC REPORTS USED TO DOCUMENT THE ATTENDANCE AND ABSENCE OF STUDENTS.	5 YEARS	
SD3275-04	DOCUMENTATION CONCERNING THE TRANSFER AND ENROLLMENT OF STUDENTS IN DISTRICTS OTHER THAN THOSE IN WHICH THEY ARE A RESIDENT.	5 YEARS	
SD3300-01	REPORTS OF ACCIDENTS TO STUDENTS.	DATE MINOR REACHES MAJORITY AGE + 3 YEARS, IF NO CLAIM FILED	
SD3300-04	HEALTH AND MEDICAL RECORDS OF STUDENTS IN PUBLIC SCHOOL DISTRICTS.	DATE OF WITHDRAWAL + 7 YEARS	
SD3300-04	HEALTH AND MEDICAL RECORDS OF STUDENTS IN PUBLIC SCHOOL DISTRICT.	UNTIL THE STUDENT'S 21ST BIRTHDAY	
SD3300-05	CARD OR OTHER FORM OF RECORD PROVIDING INFORMATION ON WHOM TO CONTACT IN CASE OF ACCIDENT OR ILLNESS TO A STUDENT.	US OR DATE OF WITHDRAWAL, WHICHEVER SOONER	
SD3300-07a	WORKSHEETS, CHECKLISTS, EXAMINATION FORMS, AND SIMILAR DOCUMENTS USED IN STUDENT HEALTH SCREENING.	AV AFTER ENTRY OF INFORMATION ON CUMULATIVE HEALTH RECORD	
SD3300-08a	IMMUNIZATION RECORD (EITHER SEPARATE OR IN COMBINATION WITH A CUMULATIVE HEALTH CARD AS IN ITEM NUMBER 3300-04).	DATE OF WITHDRAWAL + 2 YEARS	
SD3300-11a	LOGS OR REPORTS OF MEDICATION OR TREATMENT ADMINISTERED TO STUDENTS ON A GROUP OR INDIVIDUAL BASIS.	3 YEARS	
SD3325-01	A SET OF HIGH LEVEL INSTRUCTION GUIDELINES THAT INTEGRATE TEKS AND STANDARDIZED TESTING (STAAR, TAKS) EXPECTATIONS INTO A BROAD OUTLINE OF WHAT WILL BE TAUGHT.	US	
SD3325-02	INSTRUCTOR'S RECORDS DOCUMENTING INDIVIDUAL GRADES EARNED BY A STUDENT AND ANY CORRESPONDING AVERAGE(S) OF INDIVIDUAL GRADES USED TO MAKE ENTRIES IN THE ACADEMIC ACHIEVEMENT OR CUMULATIVE RECORD.	1 YEAR AFTER ENTRY OF GRADES IN THE ACADEMIC ACHIEVEMENT OR CUMULATIVE RECORD	

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Record Series #	Record Name	Retention	Remarks
SD3325-03	PERIODIC GRADE REPORTS CREATED FOR INTERNAL ADMINISTRATIVE PURPOSES, PROVIDING DATA ON GRADES OR GRADE RANKINGS BY CLASS, TEACHER, CAMPUS, COURSE, POPULATION, ETHNIC BREAKDOWN	AV	
SD3325-04	TEACHER-SPECIFIC DOCUMENTS REGARDNG IMPLEMENTATION OF CURRICULUM GUIDE, SELECTION OF CLASSROOM MATERIALS AND HOMEWORK.	UNTIL END OF SCHOOL YEAR	
SD3325-05	COPIES OF REPORT CARDS OR GRADE REPORTS OR A COMPARABLE RECORD EVIDENCING THE GRADES THAT HAVE BEEN REPORTED FOR A STUDENT TO THE STUDENT'S PARENTS.	1 YEAR AFTER ENTRY OF GRADES IN THE ACADEMIC ACHIEVEMENT OR CUMULATIVE RECORD	
SD3350-01a	DISCIPLINE RECORDS; RECORDS RELATING TO REMOVAL TO A DISCIPLINARY ALTERNATIVE EDUCATION PROGRAM, SUSPENSION OR EXPULSION.	5 YEARS	
SD3350-01b	DISCIPLINE RECORDS; RECORDS RELATING TO FORMS OF DISCIPLINE OTHER THAN REMOVAL TO A DISCIPLINARY ALTERNATIVE EDUCATION PROGRAM	AV	
SD3350-02	INDIVIDUAL STUDENT COUNSELING FILES MAINTAINED BY SCHOOL COUNSELORS, INCLUDING PARENTAL CONFERENCE REPORTS.	AV	
SD3350-02	INDIVIDUAL STUDENT COUNSELING FILES MAINTAINED BY SCHOOL COUNSELORS, INCLUDING PARENTAL CONFERENCE REPORTS.	5 YEARS BEYOND CESSATION OF COUNSELING SERVICES	
SD3375-04	COOPERATIVE TRAINING PLANS; APPLICATIONS FOR PARTICIPATION IN WORK STUDY PROGRAMS; STUDENT RATING FORMS, PROGRESS REPORTS, AND REPORT CARDS; INDIVIDUAL FOLLOW-UP RECORDS; AND SIMILAR RECORDS OF ASSIGNMENTS	END OF ENROLLMENT + 5 YEARS	
SD3400-04	ANY COPIES OF FORMS OR CERTIFICATES MAINTAINED IN STUDENT FILES RELATING TO APPLICATIONS FOR DRIVERS LICENSES, COURSE COMPLETIONS, INSURANCE DISCOUNT FORMS, AND NOTICES OF CANCELLATION.	AV	
SD3425-01b	ACCREDITATION INVESTIGATIVE REPORTS FROM THE TEXAS EDUCATION AGENCY TO THE BOARD OF TRUSTEES OF A SCHOOL DISTRICT.	PERMANENT	
SD3425-03	PLAN AND SUPPORTING DOCUMENTATION DEVELOPED, EVALUATED, AND REVISED ANNUALLY, IN ACCORDANCE WITH DISTRICT POLICY, BY THE SUPERINTENDENT.	US + 5 YEARS	
SD3450-02	DAILY RECORD OF FULL-PRICE, REDUCED-PRICE, AND FREE BREAKFASTS AND LUNCHES SERVED.	END OF PROGRAM YEAR + 5 YEARS	
SD3450-03	INVENTORY RECORDS OF FOOD AND FOOD EQUIPMENT.	END OF PROGRAM YEAR + 5 YEARS	
SD3450-04a	APPLICATIONS FROM PARENTS FOR FREE OR REDUCED PRICE BREAKFAST OR LUNCHES, AND ROSTERS OR LISTS OF ELIGIBLE STUDENTS.	END OF PROGRAM YEAR + 5 YEARS	
SD3450-05	HEALTH INSPECTION REPORTS.	END OF PROGRAM YEAR + 5 YEARS	

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Record Series #	Record Name	Retention	Remarks
SD3450-06	DAILY MENUS AND RELATED PLANNING RECORDS.	END OF PROGRAM YEAR + 5 YEARS	
SD3475-05a	REQUISITIONS AND SUPPLEMENTAL REQUISITIONS FOR TEXTBOOKS, LEARNING SYSTEMS, AND RELATED MATERIALS, INCLUDING THOSE FOR USE BY VISUALLY DISABLED STUDENTS, PLACED WITH THE TEXAS EDUCATION AGENCY	FE + 2 YEARS	
SD3500-03a	MEDICAL EXAMINATION REPORTS.	US + 3 YEARS	
SD3500-03b	SCHOOL BUS DRIVER TRAINING CERTIFICATION VERIFICATIONS.	US, EXPIRES, OR TERMINATION + 5 YEARS	
SD3500-03c	DRIVER'S LICENSE RECORD CHECKS.	US	
SD3500-04	DOCUMENTATION, MAINTAINED IN THE FORM OF LISTS OF ACTUAL BUS RIDERS BY NAME AND ROUTE NUMBER, INCLUDING ALL ASSOCIATED RECORDS PROVIDING SOURCE INFORMATION NEEDED TO COMPLETE RIDERSHIP SECTIONS	3 YEARS	
SD3500-06	A TURN-BY-TURN ACCOUNTING FOR EACH APPROVED ROUTE, SPECIFYING ROAD DESIGNATIONS AND CORRESPONDING MILEAGES.	US + 3 YEARS	
SD3500-07b	SCHOOL TRANSPORT COST AND MAINTENANCE RECORDS, SERVICE REQUESTS/WORK ORDERS.	2 YEARS	
SD3500-07c	DAILY ACTIVITY REPORTS COMPILED BY VEHICLE SHOP PERSONNEL AND/OR DRIVERS SHOWING FUEL AND OIL CONSUMPTION, ODOMETER READINGS, ROUTINE INSPECTIONS, ETC., FROM WHICH DATA IS DERIVED FOR OPERATING COST REPORTS	2 YEARS	
SD3500-07d	SCHOOL BUS USAGE REPORTS FOR EXTRACURRICULAR ACTIVITIES, FIELD TRIPS, OR FOR PRIVATE PURPOSES UNDER CONTRACT NEEDED FOR COMPILING ANNUAL OPERATING COSTS REPORTS UNDER (e).	2 YEARS	
SD3500-07e	SCHOOL TRANSPORT COST AND MAINTENANCE RECORDS, ANNUAL OPERATION COST REPORT SUBMITTED TO THE TEXAS EDUCATION AGENCY.	FE + 5 YEARS	
SD3575-01	ABSENCE FROM DUTY REPORTS.	4 YEARS	
SD3575-02a	COPIES OF APPLICATION/ RECOMMENDATIONS ENDORSED BY THE SUPERINTENDENT OR OTHER AUTHORIZED SCHOOL OFFICIAL AND FORWARDED BY THE DISTRICT OR THE APPLICANT TO THE TEXAS EDUCATION AGENCY; APPLICATION FOR NONRENEWABLE PERMIT.	DATE OF EXPIRATION OR DENIAL OF PERMIT + 1 YEAR	
SD3575-05a	PERFORMANCE APPRAISAL RECORD (INCLUDING DOCUMENTATION SUBMITTED BY THE TEACHER).	PERMANENT	
SD3575-05b	PERFORMANCE APPRAISAL RECORDS; OBSERVATION/ EVALUATION FORMS (INCLUDING DOCUMENTATION SUBMITTED BY THE TEACHER).	US + 2 YEARS OR DATE OF SEPARATION + 2 YEARS, WHICHEVER SOONER	

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Record Series #	Record Name	Retention	Remarks
SD3575-11	CRIMINAL HISTORY CHECKS.	MUST BE DESTROYED 1 YEAR AFTER RECEIVED OR DATE INFORMATION USED FOR THE AUTHORIZED PURPOSE, WHICHEVER SOONER	
SD3575-16	PERSONNEL ROSTERS INCLUDING THOSE DETAILING ASSIGNMENTS TO GRADES, COURSES, ETC.	3 YEARS	
SD3600-01	PUBLIC EDUCATION INFORMATION MANAGEMENT SYSTEM (PEIMS) DATA SUBMISSIONS.	5 YEARS	
SD3600-02	DATA PRINTOUTS OR REPORTS FROM THE TEXAS EDUCATION AGENCY (TEA) OR OTHER AGENCIES PROVIDED FOR INFORMATIONAL PURPOSES SHOWING DATA RECEIVED AND ENTERED IN TEA	AV	
SD3625-03	SCHOOL CALENDAR.	US + 2 YEARS	
SD3625-04	UIL; CORRESPONDENCE, SCHEDULES, ROSTERS, REPORTS, RECORDS OF PARTICIPATION, AND SIMILAR DOCUMENTATION, EXCEPT FINANCIAL RECORDS (SEE LOCAL SCHEDULE GR), CONCERNING THE PARTICIPATION OF A DISTRICT IN ACADEMIC, MUSIC	2 YEARS	
SD3625-08	PARKING DECAL/PERMIT RECORDS.	US OR EXPIRATION OF PERMIT	
PW5450-01a	RECORDS DOCUMENTING ASBESTOS ABATEMENT PROJECTS IN PUBLIC BUILDINGS.	30 YEARS FROM THE DATE OF PROJECT COMPLETION	
PW5450-07a	AUTHORIZED DISCHARGES TO SURFACE WATERS-RECORDS DOCUMENTING PERMIT REQUIREMENTS FOR MONITORING AND PROCESSING THE SURFACE DISCHARGE OF WASTEWATER GENERATED FROM TREATMENT OF WATER CONTAMINATED	3 YEARS	
GR5800-05	ELECTRONIC FILES USED TO PRODUCE OR MODIFY AN INFORMATION SYSTEM OR DATABASE, INCLUDING, BUT NOT LIMITED TO, WORK FILES, MAINTENANCE AND TEST FILES, PRINT FILES, AND INTERMEDIATE INPUT/OUTPUT RECORDS.	UNTIL ELECTRONIC RECORDS ARE TRANSFERRED TO AND MADE USABLE IN A NEW SYSTEM ENVIRONMENT, OR FILES HAVE MET A RETENTION PERIOD ESTABLISHED IN THIS OR OTHER COMMISSION SCHEDULE, WHICH EVER SOONER	

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