Records Management and Retention Procedures

ARGYLE ISD

Student Records - Retention Periods

Meets or Exceeds TSLAC Local Schedule SD,
Retention Schedule for Records of Public School Districts

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ABBREVIATIONS USED IN THIS SCHEDULE

CE - Calendar year end
CFR - Code of Federal Regulations
FE - Fiscal year end
LA - Life of Asset
TAC - Texas Administrative Code
US - Until Superseded

PART 1: STUDENT ACADEMIC RECORDS

Retention Note: Any records in this part (e.g., enrollment cards) created for students who enroll or register in a school district, but who do not subsequently attend classes need to be retained for 5 years.

Record Number	Record Title	Record Description	Retention Period	Remarks
SD3200-01	**ACADEMIC RECORDS**			
SD3200-01a	**ACADEMIC RECORDS**	The academic achievement record or its equivalent used to record academic achievement in grades 9-12.	PERMANENT.	By regulation – 19 TAC §74.5.
***SD3200-01b**	**ACADEMIC RECORDS**	Cumulative record of achievement in grades Pre-K through 8.	Date of withdrawal + 5 years.	**Retention Note:** Academic records of K-8 student receiving 9-12 course credit must be maintained PERMANENTLY.
SD3200-02	**BIRTH DATE DOCUMENTATION**	Copies of birth certificates, church records, bible records, passport or immigration records, or other documents used to establish a date of birth.	5 years	
SD3200-03	**CUSTODY DOCUMENTS**	Copies of court instruments relating to adoption, guardianship, or custody.	Until the student is 18 or date of withdrawal + 2 years, whichever sooner.	**Retention Note:** It is an exception to the retention period given that a court order superseded by a subsequent order (e.g., a change in guardianship) need be retained only as long as administratively valuable.
SD3200-04	**ENROLLMENT OR REGISTRATION FORMS**	Enrollment or registration forms used to enroll or register students.	US or date of withdrawal + 5 years, whichever sooner.	See retention note (b) on page 6.
***SD3200-05**	**HOME LANGUAGE SURVEYS**	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.	By regulation – 19 TAC §89.1215(a).

Record Number	Record Title	Record Description	Retention Period	Remarks
SD3200-06	**MISSING CHILD PREVENTION AND IDENTIFICATION PROGRAM RECORDS**			
SD3200-06a	**MISSING CHILD PREVENTION AND IDENTIFICATION PROGRAM RECORDS**	Fingerprint cards.	Date of withdrawal.	
SD3200-06b	**MISSING CHILD PREVENTION AND IDENTIFICATION PROGRAM RECORDS**	Photographs.	US, or 3 years, whichever is sooner.	**Retention Note:** A Texas Education Agency regulation (19 TAC 61.1041) requires that at withdrawal a student's fingerprints and photograph taken as part of a Missing Child Prevention and Identification Program be returned to the student's parent or guardian. If a district is unable to return the fingerprints and photograph, they **must** be destroyed.
SD3200-06c	**MISSING CHILD PREVENTION AND IDENTIFICATION PROGRAM RECORDS**	Parental consents.	US, or 3 years, whichever is sooner.	
SD3200-07	**PARENTAL PERMISSION RECORDS**	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.	**Retention Note:** If a student is involved in an accident while engaged in an activity for which parental consent was granted, the consent form or statement must be retained for the same period as Accident Reports (see item number SD3300-01).
SD3200-08	**STUDENT WITHDRAWAL/RECORD TRANSFER FORM**		5 years	Applies to both sending and receiving districts.
SD3200-09	**TEST AND ACADEMIC MEASUREMENT REPORTS**			

Record Number	Record Title	Record Description	Retention Period	Remarks
***SD3200-09a**	**TEST AND ACADEMIC MEASUREMENT REPORTS**	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.	**Retention Note:** a) If testing results of the types described are not recorded on the academic achievement or cumulative record (see item number SD3200-01) either manually or by affixing labels, the results must be retained PERMANENTLY for grades 9-12 and until the date of withdrawal + 5 years for all other grades. b) Test results for K-8 student testing for 9-12 credit, must be retained PERMANENTLY.
SD3200-09b	**TEST AND ACADEMIC MEASUREMENT REPORTS**	Reports of results of other tests or measurements (e.g., reading/mathematics profiles).	Date of withdrawal + 5 years.	See retention note (b) on page 6.
SD3200-09c	**TEST AND ACADEMIC MEASUREMENT REPORTS**	District summaries on a group basis of the results of standardized testing.	3 years.	
***SD3200-09d**	**TEST AND ACADEMIC MEASUREMENT REPORTS**	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.	19 TAC §101.3031(d) and TEA Student Assessment Division: Test Security Supplement.
SD3200-10	**ETHNICITY FORMS**	Student and Staff Ethnicity and Race Data Questionnaire.	3 years or until litigation, claim, or audit is complete, whichever is later.	By Regulation - 2 CFR 200.333.
SD3200-11	**STATEMENT OF ASSURANCE FOR STUDENTS WHO ARE VICTIMS OF A VIOLENT CRIMINAL ACT**	School Safety Choice Option (SSCO) Transfer Policy Statement of Assurance includes date the incident occurred, incident number, identity of perpetrator, if known, etc.	5 years.	Texas Education Agency Guidance Relating to a Student Who Is a Victim of a Violent Criminal Offense, Section III, (d).

Record Number	Record Title	Record Description	Retention Period	Remarks
***SD3200-12**	**STUDENT TESTING AND ASSESSMENT ACCOMMODATION RECORDS**	Records of accommodation requests and supporting documentation. Accommodations, or designated supports, or changes to materials or procedures that enable students to access learning and testing.	1 year.	Per published TEA guidelines for requesting an accommodation, all approved accommodation requests will expire on December 31st of the year the request was approved. A new accommodation request must be submitted each calendar year if the student continues to need that accommodation.

PART 2: FAMILY EDUCATIONAL RIGHTS AND PRIVACY ACT RECORDS

Record Number	Record Title	Record Description	Retention Period	Remarks
SD3225-01	**ACCESS POLICIES**	Written policies and procedures demonstrating how a district meets the requirements of the Family Educational Rights and Privacy Act of 1974, as amended, and federal rules adopted under the act.	US.	By regulation - 34 CFR 99.32.
SD3225-02	**ACCESS TO INFORMATION, RECORDS OF**	Record of each request for access to and each disclosure of personally identifiable information from the educational records of a student.		
***SD3225-02a**	**ACCESS TO INFORMATION, RECORDS OF**	Documentation of requests from and disclosures to the parent or eligible student, to an official of the district for what the district has determined are legitimate educational interests, to a party with written consent from the parent or eligible student, or to a party seeking directory information.	Date records produced + 1 year.	By law and regulation – 20 USC 1232g, and 34 CFR 99.32.

Record Number	Record Title	Record Description	Retention Period	Remarks
***SD3225-02b**	**ACCESS TO INFORMATION, RECORDS OF**	Documentation of requests from and disclosures to any party not included in (a).	Retain with the education records of the student as long as the records are maintained.	By regulation and law –34 CFR 99.32(a)(2) and Texas Family Code 58.0051(c).

SD3225-02c	**ACCESS TO INFORMATION, RECORDS OF**	Written consents from the parent or eligible student for information disclosure. (1) From the parent. (2) From the eligible student.	Until the student is 18. Expiration, termination, or revocation of consent +2 years, or destruction of all records to which consent applies + 2 years, whichever sooner.	
SD3225-02d	**ACCESS TO INFORMATION, RECORDS OF**	Written refusals from the parent or eligible student to the disclosure of directory information. (1) If refusals are valid as long as the student is in attendance. (2) If refusals must be renewed each academic year.	5 years. 5 years after date of withdrawal	
SD3225-03	**PROTEST OF RECORD STATEMENTS**	Statements by parents or eligible students commenting on contested information in a student record, or stating why they disagree with a district's decision not to amend a record, or both.	For as long as the record containing the contested information is maintained.	By regulation - 34 CFR 99.21(c)(1).

Record Number	Record Title	Record Description	Retention Period	Remarks
***SD3225-04**	**RECORD AMENDMENT REQUESTS AND RELATED DOCUMENTATION**	Requests from parents or eligible students to amend student records, notices by the district of denial or consent to amendments, requests for hearings on denied requests, hearing notices, and written decisions by hearing examiners.	Date of final resolution +2 years.	

PART 3: RECORDS OF SPECIAL POPULATIONS AND SERVICES

Retention Note: The term "cessation of services" used in the retention periods set in sections 3-1 through 3-5 with reference to records created on students who are referred to but not subsequently enrolled in the special program described, means the date on which the determination against enrollment is made.

SECTION 3-1: SPECIAL EDUCATION PROGRAM RECORDS

Record Number	Record Title	Record Description	Retention Period	Remarks
SD3250-01	**ENROLLMENT LISTS AND ROSTERS**		5 years.	See retention note (b) on page 6.

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Record Number	Record Title	Record Description	Retention Period	Remarks
***SD3250-02**	**STUDENT RECORDS**	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) and transitional planning committee documentation; individual educational plans (IEP) and individual transitional plans (ITP); parental consent forms for testing and placement; and other records of services required under federal and state regulation. Includes records of students receiving School Health and Related Services (SHARS), see Texas Medicaid Provider Procedures Manual.	Cessation of services + 5 years, *but see retention note (a).*	**Retention Notes:** a) It is an exception to the retention period given for this record group, that the following information must be retained PERMANENTLY in some form on each student in grades 9-12 participating in a special education program: name, last known address, student ID or Social Security number, grades, classes attended, and grade level and year completed. If an academic achievement record [see item number SD3200-01(a)] is created for the student and maintained among those for students in the regular population, it is not necessary for special education records custodians to maintain the prescribed information beyond 5 years after the cessation of services, provided that it is contained in the Academic Achievement Record. b) Prior to the destruction of any records in this record group, the eligible student or the parents of the student, as applicable, must be notified in accordance with federal regulation. c) See retention note (b) on page 6.
***SD3250-03**	**VIDEO SURVEILLANCE, SPECIAL EDUCATION SETTINGS**	Any video and audio recorded from a camera placed in a classroom or other special education setting.	3 months.	By law – Texas Education Code, Section 29.022(e) and (e-1).

SECTION 3-2: BILINGUAL AND SPECIAL LANGUAGE PROGRAM RECORDS

Record Number	Record Title	Record Description	Retention Period	Remarks
SD3250-08	**STUDENT RECORDS**	Records of each student referred to or receiving bilingual or special language services, including recommendations from parents or teachers for bilingual instruction, student interview documentation, notifications to parents, parental consents or denials, language proficiency assessment committee (LPAC) reports, exit reports, follow-up study reports, and other records of services required by state regulation or pertinent to the identification of students for bilingual education or special language programs.	Cessation of services + 5 years.	See retention note (b) on page 6.

SECTION 3-3: GIFTED/TALENTED PROGRAM RECORDS

Record Number	Record Title	Record Description	Retention Period	Remarks
SD3250-16	**STUDENT RECORDS**	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, and other records of services required under state regulation or pertinent to the identification of students for participation in gifted/talented programs.	Cessation of services + 5 years.	

SECTION 3-4: SECTION 504 PROGRAM RECORDS

Record Number	Record Title	Record Description	Retention Period	Remarks
SD3250-20	**STUDENT RECORDS**	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; and other records of services required under Section 504 regulations.	Cessation of services + 5 years.	See retention note (b) on page 6.

SECTION 3-5: DYSLEXIA PROGRAM RECORDS

Record Number	Record Title	Record Description	Retention Period	Remarks
SD3250-26	**ENROLLMENT LISTS AND ROSTERS**		Cessation of services + 5 years.	
SD3250-27	**STUDENT RECORDS**	Records of each student referred to or receiving dyslexia program services, including referral and assessment reports; group deliberations; parental notices; and other records of services required under state regulation.	Cessation of services + 5 years.	**Retention Note:** This record group does not include the special education records of students with dyslexia or related disorders receiving special education services. See item number SD3250-02.

SECTION 3-6: NEW GENERATION SYSTEM (NGS) RECORDS [FORMERLY MIGRANT STUDENT RECORD TRANSFER SYSTEM (MSRTS)]

Retention Note: Documentation and retention requirements for this section are based on current guidance in the Texas Manual for the Identification and Recruitment of Migrant Children, developed by Texas Education Agency, Texas Migrant Education Program, Curriculum Division.

Record Number	Record Title	Record Description	Retention Period	Remarks
***SD3250-33**	**DAILY NGS LOGS**		10 years.	

Record Number	Record Title	Record Description	Retention Period	Remarks
***SD3250-34**	**ENROLLMENT AND WITHDRAWAL REPORTS**		10 years.	
***SD3250-35**	**MONITORING DOCUMENTATION**	Summaries of eligibility verifications and validations, parent/guardian questionnaires, copies of validated certificates of eligibility, and copies of any correspondence from a school district to a regional educational service center requesting deletion of ineligible children from the NGS.	10 years.	
***SD3250-36**	**RECRUITING RECORDS**	Recruiter logs, questionnaires, and similar records documenting efforts of recruiters to identify and enroll currently and formerly migrant students.	10 years.	
SD3250-37	**STUDENT RECORDS**			
***SD3250-37a**	**STUDENT RECORDS**	Certificates of eligibility (COE). This includes all changes, corrections, additions and residency verification documentation.	Qualifying Arrival Date (QAD) + 10 years.	

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Record Number	Record Title	Record Description	Retention Period	Remarks
SD3250-37b	**STUDENT RECORDS**	Copies of most current educational and health records or forms providing educational and health updates, information from which is transmittable to regional educational service centers for data entry.	US.	**Retention Note:** Program regulations require that an active file be maintained on each migrant child identified for the current school year in a project district or cooperative project district. The file must include, in addition to the certificate of eligibility, a copy of each of the most current educational and health records of the student. Although the minimum retention period is set as US, superseded records should not be disposed of until notification that all required data from the superseded records has been accurately reflected in NGS records in Little Rock. If original student educational and health records, rather than copies, are the source for NGS data, the records must be retained for the periods established in Parts 1 and 5 of this schedule.
SD3250-37c	**STUDENT RECORDS**	Data verification reports from the NGS center in Little Rock.	5 years.	

SECTION 3-7: OTHER SPECIAL POPULATIONS RECORDS

Record Number	Record Title	Record Description	Retention Period	Remarks
SD3250-43	**FEDERAL IMPACT AID SURVEY FORMS**	Locally designed form used to survey parents to determine eligibility for federal impact aid under P.L. 81-874.		

Record Number	Record Title	Record Description	Retention Period	Remarks

SD3250-43a	**FEDERAL IMPACT AID SURVEY FORMS**	Survey forms of students determined to be eligible and used to complete district applications for school assistance in federally affected areas.	5 years.	See retention note (b) on page 6.
SD3250-43b	**FEDERAL IMPACT AID SURVEY FORMS**	Survey forms of students determined not to be eligible.	5 years.	
SD3250-44	**McKINNEY HOMELESS ASSISTANCE ACT STUDENT RECORD**		5 years.	See retention note (b) on page 6.
***SD3250-45**	**CIVIL RIGHTS DATA COLLECTION (CRDC)**	The Civil Rights Data Collection (CRDC) is a biennial (i.e., every other school year) survey of public schools required by Office of Civil Rights (OCR) since 1968. The CRDC collects a variety of information including student enrollment and educational programs and services, most of which is dis-aggregated by race/ethnicity, sex, limited English proficiency, and disability. Information is reported electronically through the CRDC Data Entry Tool.	After submission of data + 5 years.	

PART 4: ATTENDANCE RECORDS

Record Number	Record Title	Record Description	Retention Period	Remarks
SD3275-01	**ATTENDANCE CONTROL DOCUMENTATION**			
SD3275-01a	**ATTENDANCE CONTROL DOCUMENTATION**	Correspondence to and from parents or guardians concerning absences and tardiness.	2 years.	
SD3275-01b	**ATTENDANCE CONTROL DOCUMENTATION**	Correspondence with law enforcement or other agencies concerning violations of the compulsory school attendance law, including all associated documentation.	2 years.	

Record Number	Record Title	Record Description	Retention Period	Remarks
SD3275-01c	**ATTENDANCE CONTROL DOCUMENTATION**	Attendance officer's logs and reports used to track activities related to student attendance and absences, including contacts with parents or guardians.	2 years.	
SD3275-01d	**ATTENDANCE CONTROL DOCUMENTATION**	Documents relating to student attendance hearings and appeals.	Date of decision + 2 years.	
SD3275-02	**ATTENDANCE REPORTS**			
SD3275-02a	**ATTENDANCE REPORTS**	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	**ATTENDANCE REPORTS**	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.	
SD3275-03	**SCHOLASTIC CENSUS RECORDS**	Census cards or rolls of school age children residing in the county or district. These are records of the abolished offices of county superintendent of schools.	PERMANENT.	

SD3275-04	**TRANSFER, APPLICATIONS FOR, AND ASSOCIATED REPORTS**	Documentation concerning the transfer and enrollment of students in districts other than those in which they are a resident.	5 years.	See retention note (b) on page 6.

PART 5: STUDENT HEALTH RECORDS

Record Number	Record Title	Record Description	Retention Period	Remarks
SD3300-01	**ACCIDENT REPORTS**	Reports of accidents to students.	Date minor reaches majority age + 3 years, if no claim filed; 3 years after settlement or denial of claim if a claim is filed, whichever applicable.	
SD3300-02	**[WITHDRAWN – SEE GR1000-41]**			
SD3300-03	**[WITHDRAWN – SEE SD3300-04 or GR1000-26, AS APPLICABLE]**			
SD3300-04	**CUMULATIVE HEALTH CARD OR RECORD**	Health and medical records of students in public school districts.	Date of withdrawal + 7 years, or until the student's 21st birthday, whichever later.	By regulation - 22 TAC 165.1(b).
SD3300-05	**EMERGENCY CARDS**	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.	
SD3300-06	**EXCLUSION AND VERIFICATION DOCUMENTATION**	Affidavits or similar documents seeking the exclusion of students from participation in immunization or other health care programs for medical or religious reasons, or verifications of previous illness or health testing.		

Record Number	Record Title	Record Description	Retention Period	Remarks
SD3300-06a	**EXCLUSION AND VERIFICATION DOCUMENTATION**	Exclusion documentation. (1) Affidavits of medical reasons. (2) Affidavits of conscience-based exclusions.	 1 year from date signed by physician, or date of withdrawal if contraindication is lifelong. Date affidavit notarized + 2 years, or date of withdrawal, whichever sooner.	 By law and regulation – Texas Education Code 38.002(a) and 25 TAC 97.62(1). By regulation – 25 TAC 97.62(2).
***SD3300-06b**	**EXCLUSION AND VERIFICATION DOCUMENTATION**	Confirmations or statements of immunity, infection, or positive history of illness permitted by law to except students from state immunization requirements.	Date of withdrawal + 2 years.	**Retention Note:** If data from the verification documentation is recorded on the cumulative health card (see item number SD3300-04), the documentation need be retained only as long as administratively valuable after recording.
SD3300-06c	**EXCLUSION AND VERIFICATION DOCUMENTATION**	Verifications from physicians or health agencies of prior testing of sight, hearing, and spinal curvature.	2 years.	By regulation – 25 TAC 37.22(13), 25 TAC 37.26(b) (vision, hearing), 25 TAC 37.145(b) (spinal).
SD3300-07	**HEALTH SCREENING DOCUMENTATION**			
SD3300-07a	**HEALTH SCREENING DOCUMENTATION**	Worksheets, checklists, examination forms, and similar documents used in student health screening.	Date of wd + 2 years	
***SD3300-07b**	**HEALTH SCREENING DOCUMENTATION**	Vision, hearing, and spinal screening reports submitted to the Texas Department of State Health Services.	2 years.	
SD3300-08	**IMMUNIZATION RECORDS**			

Record Number	Record Title	Record Description	Retention Period	Remarks
SD3300-08a	**IMMUNIZATION RECORDS**	Immunization record (either separate or in combination with a cumulative health card as in item number 3300-04).	Date of withdrawal + 2 years.	**Retention Note:** It is an exception to the retention period given for the immunization record that if immunizations are performed by school nurses or other medical technicians employed by the school district, the immunization record and parental consent forms for the administration of vaccine must be retained by the school until the person receiving the vaccine is 20 years old or 10 years after the consent form was signed, whichever later.
SD3300-08b	**IMMUNIZATION RECORDS**	Annual reports of immunization status.	3 years.	
SD3300-09	**PHYSICIAN REFERRALS AND REPORTS**	Copies of referrals to physicians, including any attached screening worksheets, and reports from physicians on referred health matters.	5 years after entry on cumulative health card	
SD3300-10	**REPORTS TO ENFORCEMENT AGENCIES**	Copies of reports on child abuse or neglect, communicable disease, dog bites, drug offenses, missing children, or sexually transmitted disease submitted to the Texas Department of State Health Services, the Texas Health and Human Services Commission, or local law enforcement and animal control agencies.	2 years.	
SD3300-11	**SPECIAL HEALTH CARE RECORDS**			
SD3300-11a	**SPECIAL HEALTH CARE RECORDS**	Logs or reports of medications or treatment administered to students on a group or individual basis.	3 years.	
SD3300-11b	**SPECIAL HEALTH CARE RECORDS**	Parent's requests and physician's authorizations for specialized health care.	End of validity of request or authorization + 2 years.	

PART 6: INSTRUCTION AND GRADE REPORTING RECORDS

Record Number	Record Title	Record Description	Retention Period	Remarks
SD3325-01	**CURRICULUM GUIDES**	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	**GRADE BOOKS**	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.	
SD3325-03	**GRADE REPORTS**	Periodic grade reports created for internal administrative purposes, providing data on grades or grade rankings by class, teacher, campus, course, population, ethnic breakdown, etc. *except* reports of the type noted in item number SD3325-05.	5 years	
SD3325-04	**LESSON PLANS**	Teacher-specific documents regarding implementation of curriculum guide, selection of classroom materials and homework.	Until end of school year.	
***SD3325-05**	**REPORT CARDS**	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.	Date of wd/graduation + 5 years	**Retention Note:** If copies of report cards or grade reports are the only record of grades received in K-8, follow SD3200-01b. If they are the only record of grades received in 9-12, follow SD3200-01a).

PART 7: DISCIPLINE AND COUNSELING RECORDS

Record Number	Record Title	Record Description	Retention Period	Remarks
SD3350-01	**DISCIPLINE RECORDS**	Records relating to the discipline, corporal punishment, suspension, and expulsion of students maintained by superintendents, principals, and counselors, including parental conference reports and correspondence with parents.		
***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, suspension, or expulsion.	5 years	
SD3350-02	**STUDENT GUIDANCE AND COUNSELING FILES**	Individual student counseling files maintained by school counselors, including parental conference reports.	5 years	**Retention Note:** Guidance and counseling records created by participation in special programs described in Part 3 of this schedule must be retained for the same period as Student Records in the appropriate section. If the records created in a federally funded project or program, the retention period is instead cessation of services + 5 years.
	STUDENT THREAT ASSESSMENT FILES (added 2/24/25)	Individual student Threat Assessment files are housed in the SIS Skyward Q and imputed by assistant principal or counselor, whichever is the lead on conducting the assessment.	6 years post graduation year, or until the student is 24 y.o.	HB 3 requires this. TEC 37.115(j-1) states: "Materials and information provided to or produced by a team during a threat assessment of a student under this section must be maintained in the student's school record until the student's 24th birthday."

***SD3350-03**	**LAW ENFORCEMENT NOTIFICATIONS**	Notification from a law enforcement agency of the arrest of a student enrolled in a public primary or secondary school in accordance with Code of Criminal Procedure, art. 15.27.	Destroy at the end of the school year in which notification was issued.	By law – Texas Education Code, 37.017. **Retention Note:** Texas Education Code §37.017 prohibits law enforcement notification to be attached to student's permanent academic record (SD3200-01a).

PART 8: ADULT AND VOCATIONAL EDUCATION RECORDS

Record Number	Record Title	Record Description	Retention Period	Remarks
*SD3375-01	CLASS ORGANIZATION REPORTS AND ROSTERS		5 years.	See retention note (b) on page 6.
*SD3375-02	CURRICULUM PLANNING DOCUMENTATION	Project and study plans developed by instructors in vocational education, including those for vocational summer work.	5 years.	See retention note (b) on page 6.
*SD3375-03	FOLLOW-UP REPORTS	Reports on post-instructional experience of leavers and completers of vocational education programs.	5 years.	See retention note (b) on page 6.
*SD3375-04	STUDENT RECORDS	Cooperative training plans; applications for participation in work study programs; student rating forms, progress reports, and record cards; individual follow-up records; and similar records of assignments to and the completion by a student of vocational education projects and tasks.	End of enrollment + 5 years.	See retention note (b) on page 6.

PART 9: DRIVERS EDUCATION RECORDS

Record Number	Record Title	Record Description	Retention Period	Remarks
*SD3400-01	STUDENT RECORDS	Individual records of students enrolled in driver's education.	5 years.	See retention note (b) on page 6.
*SD3400-02	STUDENT ROSTERS		5 years, if used in lieu of individual student records; otherwise AV.	
SD3400-03	INSTRUCTIONAL CHECKLISTS	Documents, including grading sheet, completed by certified instructor during driving instruction.	1 year after entry of scores and other data in student individual record or rosters.	

SD3400-04	**LICENSING AND COMPLETION FORMS**	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.	5 years	
SD3400-05	**REQUESTS FOR RECOGNITION OF COMPLETION DOCUMENTS**		5 years	

PART 10: ACCREDITATION RECORDS

Record Number	Record Title	Record Description	Retention Period	Remarks
SD3425-01	**ACCREDITATION REPORTS**			
SD3425-01a	**ACCREDITATION REPORTS**	Reports to the Texas Education Agency on accreditation planning or the self-monitoring of progress toward the achievement of goals.	5 years after subsequent accreditation.	
SD3425-01b	**ACCREDITATION REPORTS**	Accreditation investigative reports from the Texas Education Agency to the board of trustees of a school district.	PERMANENT.	
***SD3425-02**	**[WITHDRAWN – SEE GR1000-41]**			
***SD3425-03**	**DISTRICT IMPROVEMENT PLAN**	Plan and supporting documentation developed, evaluated, and revised annually, in accordance with district policy, by the superintendent.	US + 5 years.	
***SD3425-04**	**CAMPUS IMPROVEMENT PLAN**	Plan and supporting documentation developed, reviewed, and revised each school year by the principal of each school campus for the purpose of improving student performance for all student populations.	US + 2 years.	

PART 11: FOOD SERVICE RECORDS

Record Number	Record Title	Record Description	Retention Period	Remarks
SD3450-01	**CERTIFICATES OF AUTHORITY**	Authorizations for persons to act on behalf of a school district in school lunch matters.	Date rescinded or terminated + 5 years.	
SD3450-02	**DAILY FOOD SERVICE RECORDS**	Daily record of full-price, reduced-price, and free breakfasts and lunches served.	End of program year + 5 years.	
SD3450-03	**FOOD AND FOOD EQUIPMENT INVENTORY RECORDS**	Inventory records of food and food equipment.	End of program year + 5 years.	
SD3450-04	**FREE OR REDUCED-PRICE MEAL RECORDS**			
SD3450-04a	**FREE OR REDUCED-PRICE MEAL RECORDS**	Applications from parents for free or reduced-price breakfasts or lunches, and rosters or lists of eligible students.	End of program year + 5 years.	
SD3450-04b	**FREE OR REDUCED-PRICE MEAL RECORDS**	Policy statements on free and reduced-price meals.	US + 5 years.	
SD3450-05	**HEALTH INSPECTION REPORTS**		End of program year + 5 years.	
SD3450-06	**MENU RECORDS**	Daily menus and related planning records.	End of program year + 5 years.	

PART 12: TEXTBOOK RECORDS

Record Number	Record Title	Record Description	Retention Period	Remarks
SD3475-01	**ANNUAL MEMBERSHIP REPORT**		5 years.	Obsolete record.
SD3475-02	**LOCAL TEXTBOOK COMMITTEE REPORT**		5 years.	Obsolete record.
SD3475-03	**[WITHDRAWN – SEE GR1000-25]**			
SD3475-04	**TEXTBOOK INVENTORY AND DISTRIBUTION CONTROL RECORDS**			
SD3475-04a	**TEXTBOOK INVENTORY AND DISTRIBUTION CONTROL RECORDS**	Inventories.	US + 1 year.	
SD3475-04b	**TEXTBOOK INVENTORY AND DISTRIBUTION CONTROL RECORDS**	Book cards or records comparable in function documenting what books were distributed to each student and similar records documenting their return or non-return.	End of school year or date of withdrawal, + 3 years.	
SD3475-04c	**TEXTBOOK INVENTORY AND DISTRIBUTION CONTROL RECORDS**	Records documenting the distribution, transfer, and return of textbooks on a campus by campus basis.	End of school year.	
SD3475-04d	**TEXTBOOK INVENTORY AND DISTRIBUTION CONTROL RECORDS**	Notification or reports of state-owned textbooks that have been destroyed.	2 years.	
SD3475-05	**TEXTBOOK PROCUREMENT RECORDS**			
SD3475-05a	**TEXTBOOK PROCUREMENT RECORDS**	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 (TEA), the Texas Instructional Materials Center for the Visually Impaired, or other vendors as may be permitted by law or regulation, including supporting documentation such as statements of charges, packing slips,	FE + 2 years.	

		freight bills, and shipment-error reports.		
SD3475-05b	**TEXTBOOK PROCUREMENT RECORDS**	Order notifications from the Texas Education Agency (TEA) concerning processing of textbook orders.	FE + 5 years.	Obsolete record.
SD3475-05c	**TEXTBOOK PROCUREMENT RECORDS**	Documentation relating to the procurement of sample textbooks, learning systems, and related materials.	FE + 5 years.	
SD3475-06	**TEXTBOOK SALES AND DISPOSITION RECORDS**			
SD3475-06a	**TEXTBOOK SALES AND DISPOSITION RECORDS**	State textbook sales invoices and acknowledgment statements, logs (district and campus) of textbooks paid for, payment or reduced payment waivers, payment account cards, and any district forms used for the transmittal of textbook funds from campuses to the textbook coordinator.	FE + 5 years.	
SD3475-06b	**TEXTBOOK SALES AND DISPOSITION RECORDS**	Records relating to the disposition by donation or destruction of textbooks and other instructional materials after discontinued for use in public schools.	FE + 5 years.	

PART 13: SCHOOL TRANSPORTATION RECORDS

Record Number	Record Title	Record Description	Retention Period	Remarks
SD3500-01	**APPLICATIONS FOR NEW TRANSPORTATION PROGRAMS**	Requests to the Texas Education Agency for approval of state funds for eligible student transportation services.	FE + 5 years.	
SD3500-02	**CONTRACTS FOR TRANSPORTATION SERVICES**	Contracts with public or commercial companies for pupil transportation services, including copies of applications to the Texas Education Agency (TEA) for contract approval.	4 years after the expiration or termination of the contract according to its terms.	
SD3500-03	**DRIVERS RECORDS** (see also Section 3-1 of Local Schedule GR)			
SD3500-03a	**DRIVERS RECORDS** (see also Section 3-1 of Local Schedule GR)	Medical examination reports.	US + 3 years.	
SD3500-03b	**DRIVERS RECORDS** (see also Section 3-1 of Local Schedule GR)	School bus driver training certification verifications.	US, expires, or termination + 5 years.	
SD3500-03c	**DRIVERS RECORDS** (see also Section 3-1 of Local Schedule GR)	Driver's license record checks.	US or date of separation + 2 years, as applicable.	
SD3500-04	**ELIGIBLE RIDER DOCUMENTATION**	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 of state-required pupil transportation reports (see item number SD3500-05).	3 years.	
SD3500-05	**PUPIL TRANSPORTATION REPORTS**	Annual reports to the Texas Education Agency on the number of pupils transported by school bus or private means (including route mileage), used by the agency to determine transportation allotments.	3 years.	**Retention Note:** This record group includes requests for approval of bus routes, now part of the Regular Pupil Transportation Report, but submitted separately in prior years.

SD3500-06	**ROUTE DESCRIPTIONS**	A turn-by-turn accounting for each approved route, specifying road designations and corresponding mileages.	US + 3 years.	
SD3500-07	**SCHOOL TRANSPORTATION COST AND MAINTENANCE RECORDS**			

Record Number	Record Title	Record Description	Retention Period	Remarks
SD3500-07a	**SCHOOL TRANSPORTATION COST AND MAINTENANCE RECORDS**	Vehicle master record containing the following: complete description including identification and license numbers; title and registration papers; annual beginning and ending odometer readings; total annual fuel, maintenance, labor, and parts costs; and complete maintenance and inspection history (in summary form showing date and nature of inspection, service, and repair).	LA.	**Retention Notes:** a) This schedule does not require the creation of a vehicle master record of the type described, but if a vehicle master record is not maintained, records containing the prescribed information must be retained for the life of the vehicle. For example, if work orders in SD3500-07b are the only record maintained of repairs to school buses, they must be retained for the life of the vehicle. b) If a school bus is salvaged as the result of an accident, the vehicle master record or, if one is not created, documents providing the types of information prescribed, must be retained for LA + 1 year.
SD3500-07b	**SCHOOL TRANSPORTATION COST AND MAINTENANCE RECORDS**	Service requests/work orders.	2 years.	
SD3500-07c	**SCHOOL TRANSPORTATION COST AND MAINTENANCE RECORDS**	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 and the vehicle master record.	2 years.	

SD3500-07d	**SCHOOL TRANSPORTATION COST AND MAINTENANCE RECORDS**	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 TRANSPORTATION COST AND MAINTENANCE RECORDS**	Annual operation cost reports submitted to the Texas Education Agency.	FE + 5 years.	
SD3500-08	**[WITHDRAWN – SEE GR1075-03a]**			
***SD3500-09**	**SCHOOL BUS SURVEILLANCE VIDEO**			
***SD3500-09a**	**SCHOOL BUS SURVEILLANCE VIDEO (no incident)**	Video recorded where no incident occurs.	30 days.	**Retention Note:** The Texas State Library and Archives Commission strongly urges, but does not require, retaining school bus surveillance videos for a minimum of ten school days as recording technology permits.
***SD3500-09b**	**SCHOOL BUS SURVEILLANCE VIDEO (incident)**	Video that records an incident.	30 days after incident resolved or verdict is rendered.	

PART 14: SCHOOL SAFETY RECORDS

Record Number	Record Title	Record Description	Retention Period	Remarks
SD3525-01	**EVACUATION AND FIRE EXIT PLANS**		US.	
SD3525-02	**FIRE DRILL RECORDS**	Records of fire drills, including schedules, reports, correspondence with fire departments, and associated documentation.	3 years.	
SD3525-03	**FIRE SAFETY INSPECTION REPORTS**		5 years.	

PART 15: FINANCIAL RECORDS

Record Number	Record Title	Record Description	Retention Period	Remarks
SD3550-01	**[WITHDRAWN – SEE LOCAL SCHEDULE GR, PART 2]**			
SD3550-02	**[WITHDRAWN – SEE GR1000-41]**			

Record Number	Record Title	Record Description	Retention Period	Remarks
SD3550-03	**[WITHDRAWN – SEE LOCAL SCHEDULE GR, PART 2]**			

PART 16: PERSONNEL AND STAFFING RECORDS

Retention Notes: a) This part supplements and should be used in conjunction with Part 3 of Local Schedule GR.

b) If the retention period for a record in this part is given as US or as US + a specific number of years and the person to whom the record relates ceases employment before supercession occurs, the date of separation shall also be considered the date of supercession for records retention purposes.

SECTION 16-1: INDIVIDUAL EMPLOYEE RECORDS

Record Number	Record Title	Record Description	Retention Period	Remarks
SD3575-01	**ABSENCE FROM DUTY REPORTS**		4 years.	
SD3575-02	**APPLICATIONS AND RECOMMENDATIONS FOR PROFESSIONAL OR PARAPROFESSIONAL CERTIFICATES OR PERMITS, COPIES OF**	Copies of applications/recommendations endorsed by the superintendent or other authorized school official and forwarded by the district or the applicant to the Texas Education Agency for the purposes of certification or review of qualifications.		
SD3575-02a	**APPLICATIONS AND RECOMMENDATIONS FOR PROFESSIONAL OR PARAPROFESSIONAL CERTIFICATES OR PERMITS, COPIES OF**	Application for Nonrenewable Permit.	Date of expiration or denial of permit + 1 year.	

Record Number	Record Title	Record Description	Retention Period	Remarks
SD3575-02b	**APPLICATIONS AND RECOMMENDATIONS FOR PROFESSIONAL OR PARAPROFESSIONAL CERTIFICATES OR PERMITS, COPIES OF**	All others.	5 years.	

SD3575-03	**AUDIT VERIFICATION CARDS**		US, but see retention note.	**Retention Note:** The most recent audit verification card present in his or her personnel file upon separation of an employee must be retained PERMANENTLY and should be considered an addendum to the Teacher Service Record (see item number GR1050-12 in Local Schedule GR).
SD3575-04	**TEMPORARY TEACHING STATUS AUTHORIZATIONS**	Out of state certificates, deficiency plans, and other documents temporarily authorizing a person to teach in the district until a Texas teaching certificate is obtained.	Until replaced by Texas teaching certificate or date of separation +5 years, as applicable.	

Record Number	Record Title	Record Description	Retention Period	Remarks
***SD3575-05**	**PERFORMANCE APPRAISAL RECORDS**	Records related to evaluating the performance of a teacher. Currently, teachers are evaluated under T-TESS or a locally developed appraisal system as required by Texas Education Code, Chapter 21, subchapter H. This series also includes records in prior systems: the Professional Development and Appraisal System (PDAS) and its local equivalent implemented on a statewide basis in the 1997-1998 school year; the Texas Teacher Appraisal System (TTAS) implemented on a statewide basis in the 1986-1987 school year and used through the 1996-1997 school year for the career ladder appraisal process; and TTAS functional equivalents used in districts for teacher performance appraisals for the 1983-1984, 1984-1985, and 1985-1986 school years.		**Retention Notes:** For teacher appraisal records prior to the 1983-1984 school year see item number GR1050-21 in Local Schedule GR.
SD3575-05a	**PERFORMANCE APPRAISAL RECORDS**	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.	By regulation – 29 CFR 1620.32(c).
SD3575-05c	**PERFORMANCE APPRAISAL RECORDS**	Notes taken by appraisers during observations or similar written documentation created by the teacher's supervisor that, in combination with the formal observation, is used to determine credit for the criteria and indicators on the observation/evaluation forms.	Date teacher signs for receipt of observation/evaluation form + 2 years.	
***SD3575-05d**	**PERFORMANCE APPRAISAL RECORDS**	Teacher assessments of instructional goals and outcomes.	5 years.	
SD3575-05e	**PERFORMANCE APPRAISAL RECORDS**	Professional growth plans.	4 years.	

Record Number	Record Title	Record Description	Retention Period	Remarks
SD3575-05f	**PERFORMANCE APPRAISAL RECORDS**	Grievance and response documents.	For the same period as the appraisal record to which they relate.	**Retention Note:** For employee grievance records other than those relating to performance appraisals see item number GR1050-20 in Local Schedule GR.
SD3575-06	**SERVICE RECORD AFFIDAVITS**	Affidavits attached to teacher service record claiming months served prior to the 1949-50 school year.	PERMANENT.	
SD3575-07	**[WITHDRAWN – SEE SD3575-04]**			
SD3575-09	**TEACHER CERTIFICATE REGISTERS**	Abstracts or record copies of teacher certificates of teachers working in the district. This was a standard record of county superintendents of schools.	PERMANENT.	**Retention Note:** For current Teacher Service Record, see GR1050-12.
***SD3575-11**	**CRIMINAL HISTORY CHECKS**		Must be destroyed 1 year after received or date information used for the authorized purpose, whichever sooner.	By law – Government Code §411.097(d)(3) and Texas Education Code 22.08391(a)(3). **Retention Note:** This record series is only for public school employees; for all other government employees, see item number GR1050-36 in Local Schedule GR.

***SD3575-12**	**ALTERNATIVE CERTIFICATION PROGRAMS (ACPs)**	Certification to become a teacher documents include applications to the program, transcripts, observation notes for student teachers.	Date of completion, withdrawal, discharge, or release from program + 5 years.	By regulation – 19 TAC 228.40(f).

SECTION 16-2: STAFFING RECORDS

Record Number	Record Title	Record Description	Retention Period	Remarks
SD3575-16	**PERSONNEL ROSTERS**	Including those detailing assignments to grades, courses, etc.	3 years.	
***SD3575-17**	**PERSONNEL UNIT REQUIREMENT CALCULATION WORKSHEETS**		3 years.	
SD3575-18	**SUBSTITUTE TEACHING ROSTERS**		3 years.	

PART 17: MISCELLANEOUS REPORTS AND SURVEYS

Record Number	Record Title	Record Description	Retention Period	Remarks
***SD3600-01**	**PUBLIC EDUCATION INFORMATION MANAGEMENT SYSTEM (PEIMS) DATA SUBMISSIONS**		5 years.	

SD3600-02	**DATA VERIFICATION REPORTS**	Data printouts or reports from the Texas Education Agency (TEA) or other agencies provided for informational purposes showing data received and entered in Texas Education Agency (TEA) or other agency databases. For example, reports sent by Texas Education Agency (TEA) or an educational service center showing data received and entered as the result of Public Education Information Management System (PEIMS) data submissions fall under this record group as well as any retained copies of data verification reports returnable to Texas Education Agency (TEA), such as forms used to confirm and/or update data for the Texas School Directory.	5 years.	**Retention Note:** Records management officers should use caution in assigning this record series to records of a local government to make certain they are not part of another records series listed in this schedule or, for records series unique to a government, are not part of a records series that documents the fulfillment of the statutory obligations of the government or the documentation of its functions.

Record Number	Record Title	Record Description	Retention Period	Remarks

SD3600-03	**SURVEYS**	Surveys, questionnaires, opinion polls, and similar documents received from the Texas Education Agency or other agencies, completed and returned by the superintendent or other school official, and used by the surveying agency for the preparation of needs assessments or statistical reports and not for the specific purpose of monitoring compliance with a required or grant-funded program in the respondent district. 1) Education Service Centers 2) School districts	 5 years. 5 years.	

PART 18: MISCELLANEOUS RECORDS

Record Number	Record Title	Record Description	Retention Period	Remarks
SD3625-01	**PROGRAM APPROVAL APPLICATIONS**	Applications and supporting documentation for local programs that must be approved by the Texas Education Agency before implementation but which do not involve the allocation of state or federal funds controlled by the agency.		
SD3625-01a	**PROGRAM APPROVAL APPLICATIONS**	Applications approved.	US + 5 years or life of program + 5 years, whichever applicable.	
SD3625-01b	**PROGRAM APPROVAL APPLICATIONS**	Applications not approved.	5 years.	
SD3625-02	**REQUESTS FOR WAIVER OF TEXAS EDUCATION AGENCY POLICIES AND RULES**	Requests and renewals of requests for waivers of Texas Education Agency policies and rules, including any attached documentation.		
SD3625-02a	**REQUESTS FOR WAIVER OF TEXAS EDUCATION AGENCY POLICIES AND RULES**	Requests granted.	5 years.	
SD3625-02b	**REQUESTS FOR WAIVER OF TEXAS EDUCATION AGENCY POLICIES AND RULES**	Requests not granted.	5 years.	
SD3625-03	**SCHOOL CALENDAR**		US + 2 years.	
SD3625-04	**UNIVERSITY INTERSCHOLASTIC LEAGUE RECORDS**	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, and athletic contests and programs governed by the University Interscholastic League.	2 years.	

***SD3625-05**	**EXTRACURRICULAR ACTIVITY RECORDS**	Application, selection, and evaluation records for participation in extracurricular activities (cheerleading, National Honor Society, student council, etc.)	2 years.	
***SD3625-06**	**STUDENT DRUG/ALCOHOL TEST RESULTS**			**Retention Note:** TSLAC recommends districts maintain these records separate from student cumulative folder. Follow all applicable state and federal laws controlling access and sharing of this information.
***SD3625-06a**	**STUDENT DRUG/ALCOHOL TEST RESULTS (negative results)**	Negative Results.	1 year.	
***SD3625-06b**	**STUDENT DRUG/ALCOHOL TEST RESULTS (positive results)**	Positive Results or Refusal Form.	Date of withdrawal, or 5 years, whichever sooner.	
***SD3625-07**	**VISITOR LOGS**	Logs, registers, or similar records documenting visitors.	3 years.	
***SD3625-08**	**PARKING DECAL/PERMIT RECORDS**		**US or expiration of permit.**	

PART 19: LIBRARY RECORDS

Record Number	Record Title	Record Description	Retention Period	Remarks
*SD3650-01	ACCESSION/DEACCESSION RECORDS	Records used to update library catalogs or inventory records of the accession through purchase or gift or the deaccession through loss or withdrawal of library and museum materials.	5 years.	**Retention Note:** This record series does not include the record copy of purchase requisitions or orders or accounts payable documentation. See item numbers GR1025-26 and GR1075-03 in Local Schedule GR.
*SD3650-02	BORROWER REGISTRATION RECORDS	Records documenting the registration of borrowers.	5 years.	
*SD3650-03	CIRCULATION RECORDS	Records documenting the circulation of library materials to individual borrowers.	5 years.	
*SD3650-04	INTERLIBRARY LOAN RECORDS	Records relating to the lending and borrowing of library materials through interlibrary loan.	5 years.	**Retention Note:** It is an exception to the retention period for this item that if interlibrary loan services are funded by indirect grants from the U.S. Department of Education, the record copy of documents evidencing interlibrary loan activity must be retained for FE + 7 years. See introductory retention note concerning grant records in Part 2 of Local Schedule GR.
*SD3650-05	INVENTORY RECORDS	Shelf lists or equivalent records showing current library and museum holdings.	US.	
*SD3650-06	LIBRARY CATALOGS		US.	