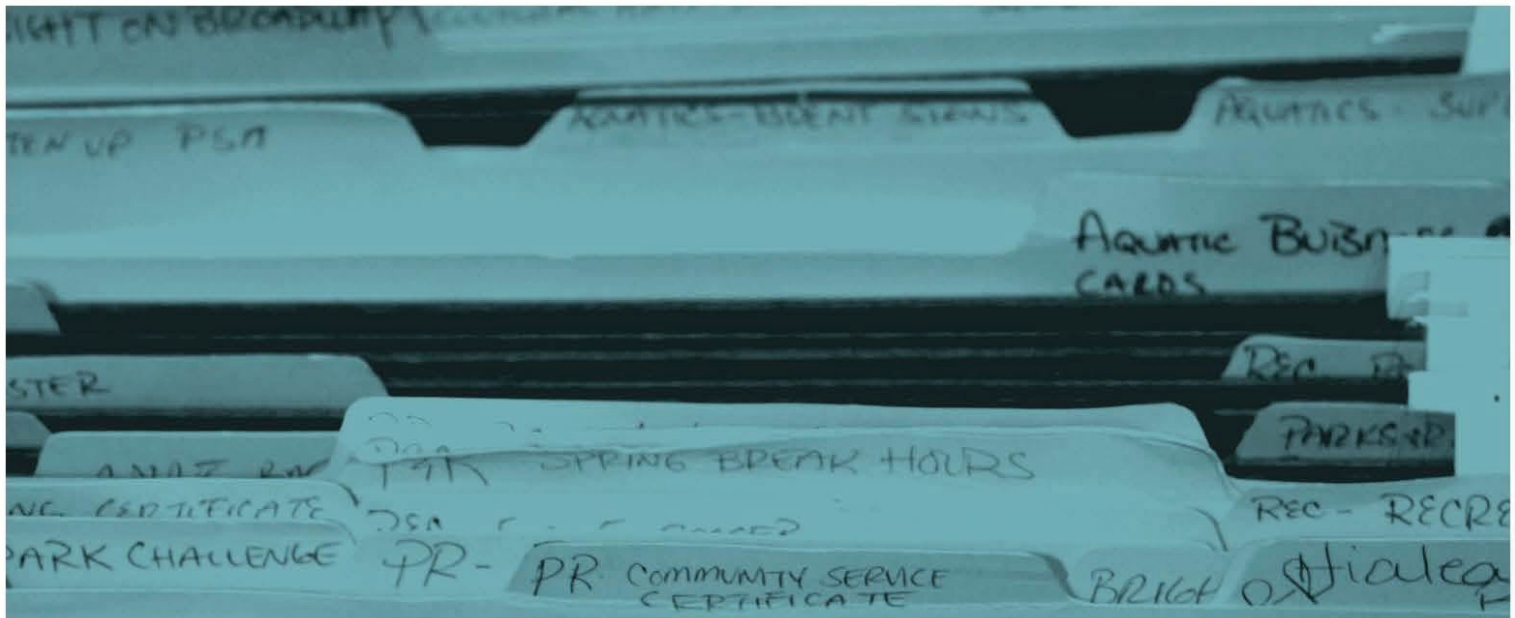


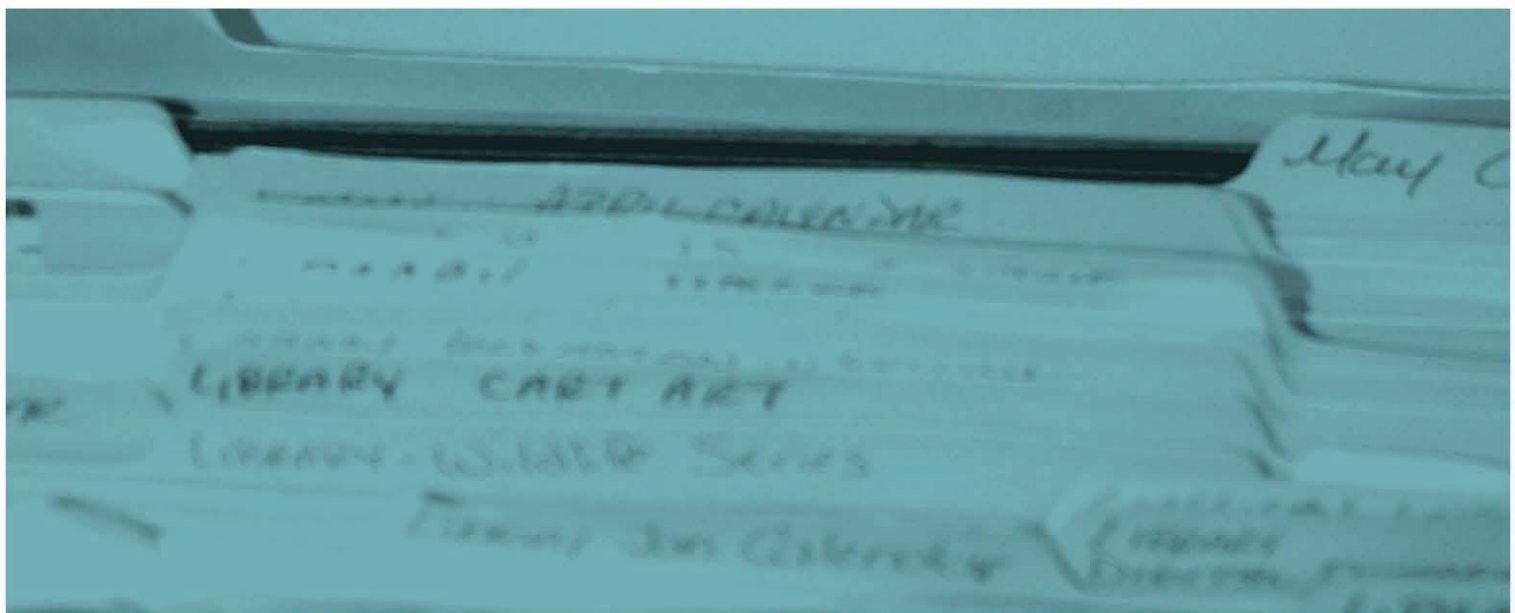


FORT WORTH ISD | FOR THE RECORD DISTRICT RECORDS MANAGEMENT

DISTRICT RECORDS MANUAL



Fort Worth
INDEPENDENT SCHOOL DISTRICT



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Policy

Please refer to the Board Policy link below.

[FORT WORTH ISD CPC\(LEGAL\)](#)

Preservation of Records

PRESERVATION OF RECORDS

The Board shall determine a time for which information not currently in use will be preserved, subject to any applicable rule or law governing the destruction and other disposition of local government records or public information. *Gov't Code 552.004*. The Board shall preserve the certified agenda or recording of a closed meeting for at least 2 years after the meeting date. If an action involving the meeting is brought within that period, the certified agenda or recording shall be preserved while the action is pending. *Gov't Code 551.104(a)*

MICROFILMING

District records may be maintained on microfilm in addition to or instead of paper or other media, subject to the requirements of Chapter 204 of the Local Government Code and rules adopted by the State Library and Archives Commission. *Local Gov't Code 204.002*

ELECTRONIC STORAGE

District records may be stored electronically in addition to or instead of source documents in paper or other media, subject to the requirements of Chapter 205 of the Local Government Code and rules adopted by the State Library and Archives Commission.

Local Gov't Code 205.002

FEDERAL INVESTIGATIONS AND BANKRUPTCY

Anyone who knowingly alters, destroys, mutilates, conceals, covers up, falsifies, or makes a false entry in any record, document, or tangible object with the intent to impede, obstruct, or influence the investigation or proper administration of any matter within the jurisdiction of any department or agency of the United States or any bankruptcy case, or in relation to or contemplation of any such matter or case, shall be fined, imprisoned not more than 20 years, or both. 18 U.S.C. 1519

The Records Management Department acts as a liaison between the district and the State and Local Records Management Division. This department represents the agency in all issues of responsibility for records management policy and statutory compliance. The agency head determines who is most qualified to be the records management officer and how the responsibilities are to be distributed within the agency. The State and Local Records Management Division relies on the head of the agency to confirm the appointment in writing and then directs all publications and correspondence to the designated records management officer. An agency director may change the appointment at any time by writing to the division and naming a new records management officer. The division maintains a file of current records management officers of all agencies. As viewed by the State and Local Records Management Division, the role of the agency records management officer is to control records activity within the agency which includes the following functions:

- ❖ Administer the records management program within the FWISD.
- ❖ Conduct or oversee the inventory of all FWISD records.
- ❖ Conduct or oversee the preparation, maintenance, and implementation of the FWISD records retention schedule.
- ❖ Protect confidential and vital records.
- ❖ Manage records within the FWISD during active use.
- ❖ Approve all documentation for transfer of records to the State Records Center.
- ❖ Approve all requests to dispose of state records.
- ❖ Attend training and information classes offered by the State and Local Records Management Division and coordinate records management training for FWISD staff, as needed.

STATE AGENCIES

- ❖ Texas Educational Agency ([TEA](#))
- ❖ Texas State Library and Archives Commission ([TSLAC](#))
- ❖ Texas Attorney General

REFERENCE MATERIAL

- ❖ Texas State Library and Archives Commission ([TSLAC](#))
- ❖ Fort Worth ISD Board Policy
- ❖ Fort Worth ISD departmental website

Records Definition

RECORDS

All documents, papers, letters, books, maps, photographs, sound or video recording, microfilm, magnetic tape, electronic media, or other information recording media, regardless of physical form or characteristic and regardless of whether public access to it is open or restricted under the laws of the state, created or received by the Fort Worth Independent School District (FWISD) or any of its officers or employees pursuant to law or in transaction of public business are hereby declared to be the records of Fort Worth Independent School District (FWISD) and shall be created, maintained, and disposed of in accordance state agencies.

This definition does not include:

- a) Extra identical copies of documents created for convenience
- b) Notes, journals, dairies, and similar documents created by an officer or employee for their convenience
- c) Blank forms, stocks of publications, library and museum materials acquired solely for the purpose if reference or display

ESSENTIAL RECORD

Essential Record means; any record of FWISD necessary to the resumption or continuation of the operations of FWISD in an emergency or disaster, to the re-creation of the legal and financial status of FWISD, or to the protection and fulfillment of obligations to the people.

PERMANENT RECORD

Permanent record means; any record of FWISD for which the retention period on a records control schedule is given as “permanent.”

RECORDS CONTROL SCHEDULE

Records Control Schedule means; a document prepared by or under the authority of the Records Management Officer listing the records maintained by FWISD, their retention periods, and other records disposition that the records management program may require.

Electronic Storage of Records

DEFINITIONS

1. “Electronic storage” means the maintenance of local government record data in the form of digital electronic signals on a computer hard disk, magnetic tape, optical disk, or similar machine-readable medium.
2. “Local government record data” means the information that by law, regulation, rule of court, ordinance, or administrative procedure in a local government comprises a local government record as defined by Section 201.003.
3. “Source document” means the local government record from which local government record data is obtained for electronic storage. The term does not include backup copies of the data in any media generated from electronic storage.

AUTHORIZATION

Any local government record data may be stored electronically in addition to or instead of source documents in paper or other media, subject to this chapter's requirements and rules adopted under it.

STANDARDS AND PROCEDURES

The commission shall adopt rules establishing standards and procedures for the electronic storage of any local government record data of permanent value and may adopt rules establishing standards and procedures for the electronic storage of any local government record data whose retention period is at least 10 years on a records retention schedule issued by the commission. The rules must be approved as required by Section 441.165, Government Code.

Concerning the types of local government record data covered by Subsection (a), the rules may require or prescribe:

1. Standards and procedures for the generation of backup or preservation copies of the local government record data on paper, microfilm, electronic, or other approved media;
2. Standards and procedures for the recopying or duplication of the magnetic tape, optical disk, or similar machine-readable medium on which the local government record data are stored;
3. Standards and procedures for the physical storage and maintenance of magnetic tapes, optical disks, or similar machine-readable media;

4. Standards and procedures for providing access by members of the public to electronically stored local government record data to which they are entitled under law; and other standards and procedures that the commission considers necessary to ensure the availability, readability, or integrity of the local government record data.
5. Other standards and procedures the commission considers necessary to ensure the local government records data's availability, readability, or integrity.

Records Management

RECORDS MANAGEMENT

Records Management means the application of management techniques to the creation, use, maintenance, retention, preservation, and disposal of records to reduce costs and improve recordkeeping efficiency. The term includes the development of the records control schedules, the management of filing and information retrieval systems, and the protection of essential and permanent records. The economical and space-effective storage of inactive records, control over the creation and distribution of forms, reports, and correspondence, and the management of micrographics, electronic, copier devices and other systems.

RECORDS PROPERTY

All records of FWISD are declared property of the Fort Worth Independent School District. No FWISD official or employee has, by virtue of his or her position, any personal or property right to such records even though he or she may have developed or compiled said records. Unauthorized destruction, removal from files, or use of such records is prohibited. Once an official or employee vacates position, all records will remain in said office, department, and school.

Department Heads

DEPARTMENT HEAD DEFINITION:

“Department Head” refers to the principals, directors, administrators, and other officers who by ordinance, order, or administrative policy oversee an office of the Fort Worth ISD that creates or receives records.

DEPARTMENT HEADS SHALL:

1. Cooperate with the Records Management Officer in carrying out the policies and procedures established in the Fort Worth Independent School District for the efficient and economical management of records and in carrying out the requirements of this order;
2. Adequately document the transaction of government business and the services, programs, and duties for which the department head/principal and his or her staff are responsible; and
3. Maintain the records in his or her care and carry out their preservation, microfilming, destruction, or other disposition only in accordance with the policies and procedures of the records management program of the Fort Worth Independent School District.

Custodian of Records

IN IMPLEMENTING THE LOCAL GOVERNMENT RECORDS ACT, DISTRICT PERSONNEL WHO ARE CUSTODIANS OF RECORDS SHALL:

School district personnel who are Custodians of Records have the responsibility of cooperating with the Records Management Department in carrying out the policies and procedures established by the district for the efficient and economical management of records and in carrying out the requirements of the Act.

Adequately document the transaction of District business and the services, programs, and duties for which they and their staff are responsible. Maintain the records in their care and carry out the preservation, microfilming, destruction, or other disposition of the records in accordance with the policies and procedures of the District's Records Management Program.

Each department head/principal shall designate a member of his or her staff to serve as Custodian of Records for the implementation of the records management program in the department/school. If the Records Management Officer determines that in the best interests of the records management program more than one Custodian of Records should be designated for a department/school, the department head/principal shall designate the number of Custodians of Records specified by the Records Management Officer. Persons designated as Custodian of Records shall be thoroughly familiar with all the records created and maintained by the department/school and shall have full access to all records of the Fort Worth Independent School District maintained by the department/school. In the event of the resignation, retirement, dismissal, or removal by action of the department head/principal of a person designated as a Custodian of Records, the department head/principal shall promptly designate another person to fill the vacancy. A department head/principal may serve as Custodian of Records for his or her department/school.

DUTIES:

1. Conduct or supervise the conduct of inventories of the records of the department in preparation for the development of records control schedules;
2. In cooperation with the Records Management Officer coordinate and implement the policies and procedures of the records management program in their departments/schools; and
3. Disseminate information to department/school staff concerning the records management program.

The Custodian of Record duties identified by the District Records Management department are:

- ❖ complete all District Records Management training
- ❖ participate in a records storage audit if scheduled
- ❖ communicate District Records Management regulations with location data owners
- ❖ maintain the location's storage area in an organized manner and ensure that all location data owners follow the district storage procedures

Non-Compliance

RETENTION SCHEDULE FOR RECORDS OF PUBLIC SCHOOL DISTRICTS

This schedule establishes mandatory minimum retention periods for records associated with Public School Districts. No local government office may dispose of a record listed in this schedule before its retention period expires. A records control schedule of a local government may not set a retention period that is less than that established for the record in this schedule. Original paper records may be disposed of prior to the expiration of their minimum retention periods if they have been microfilmed or electronically stored pursuant to the provisions of the Local Government Code, Chapter 204, or Chapter 205, as applicable, and rules of the Texas State Library and Archives Commission adopted under those chapters. Actual disposal of such records by a local government is subject to the policies and procedures of its records management program.

“Destruction of local government records contrary to the provisions of the Local Government Records Act of 1989 and administrative rules adopted under it, including this schedule, is a Class A misdemeanor and, under certain circumstances, a third-degree felony (Penal Code, Section 37.10). Anyone destroying local government records without legal authorization may also be subject to criminal penalties and fines under the Public Information Act (Government Code, Chapter 552).”

Retention Definitions

TOTAL RETENTION DEFINITIONS

- ❖ **After Close** (or terminated, completed, expired, or settled): The record is related to a function or activity with a finite closure date.
- ❖ **Administratively Valuable:** The immediate purpose for which the record was created has been fulfilled and the subsequent need for the record to conduct the operations of the agency, if any has been satisfied.
- ❖ **Calendar Year End:** December 31
- ❖ **Fiscal Year End:** August 31
- ❖ **School Year End:** June 30
- ❖ **PERMANENT:** A record that possesses enduring legal, fiscal, or administrative value and must be preserved permanently by the agency.
- ❖ **Until Superseded:** The record is replaced by an updated version. If a record subject to this retention period is discontinued or is no longer required by law, the date of the supersession is the date the decision to discontinue the record is made or the law takes effect. If the record related to an employee, the date of supersession is the date of termination or the last date the record is needed with reference to the employee, as applicable. For example, an authorization for direct deposit would be superseded on the date of the last deposit is made under the authorization.
- ❖ **Record Copy:** The document kept on file as an original or official record for the total retention period. It is distinct from a “working” or convenience” copy, which is a duplicate used for reference purposes.
 - **Caution:** Care must be taken by records management officers in determining if duplicate records are, indeed, convenience copies or if two or more copies of the same document must be considered record copies. It is very possible for the same document to be present in two or more units of a state agency and be the record copy in each unit if it serves a different function in of those units.

- ❖ **Record Series:** A group of identical or related records with the same function and retention period evaluated as a unit for retention scheduling purposes.
- ❖ **Retention Period:** The amount of time a records series **must** be retained before destruction or archival preservation.
- ❖ **Retention Notes:** *OTHER SCHEDULES – This schedule should be used by public school districts, regional educational service centers, and other local education agencies (as defined on page 2) in conjunction with Local Schedule GR (Records Common to All Governments) and Local Schedule TX (Records of Property Taxation). Many records maintained by public school districts are includable among the general administrative, financial, and personnel record series in Local Schedule GR, especially those relating to grant allocations, funding, and reporting. In any instances of conflict between retention periods established in this schedule and in Local Schedules GR or TX, the retention periods in this schedule shall prevail.*

GRANT RECORDS – The **5-year** retention period frequently established for records of school districts in this schedule and Local Schedule GR derives from federal requirements in 34 CFR 80.42(a)(1) and (c), which declares the following: “Starting date of retention period— (1) General. When grant support is continued or renewed at annual or other intervals, the retention period for the records of each funding period starts on the day the grantee or subgrantee submits to the awarding agency its single or last expenditure report for that period. However, if grant support is continued or renewed quarterly, the retention period for each year’s records starts on the day the grantee submits its expenditure report for the last quarter of the Federal fiscal year. In all other cases, the retention period starts on the day the grantee submits its final expenditure report. If an expenditure report has been waived, the retention period starts on the day the report would have been due.” These requirements involve the retention of financial and programmatic records, including supporting documents, statistical reports, and other records pertinent to program regulations or the grant agreement relating to projects or programs funded by the U.S. Department of Education through subgrants using federal funds from the Texas Education Agency.

These federal regulations require that all records of the types mentioned must be available for audit for 3 years after the date of submission of the single or last expenditure report by the Texas Education Agency as subgrantor, **not** by the school district. Because final expenditure reports are submitted by the Texas Education Agency **after** all reports from districts are received, a 5-year retention period for many records of school districts is necessary to satisfy this requirement adequately.

If an audit is pending in which expenditure or a student's eligibility to participate in a federal program is questioned, all records affecting the audit's outcome must be retained until the audit is settled.

Copies of reports or records submitted to the Texas Education Agency must be retained by school districts in accordance with this schedule.

SITE AUDITS

The District Records Department will be conducting site visits to departments and schools to review their records storage. Below are the areas of review:

Storage Room Condition

- Room is clean and free of trash
- Storage area is adequate for amount of records being stored
- Room is not used to house anything other than records
- Storage room is accessible
- Storage room is secured

Storage Room Safety

- Any free-standing shelves are secured for stability
- Heavy items are stored at a suitable height
- Records are stored within shelves with no overhang
- Storage room has adequate lighting
- Fire detection system present

Storage Boxes

- Banker boxes are used to store records
- No signs of damage to storage boxes such as water, rodent, or broken-down boxes)
- Records are not exposed to direct sunlight, fire, steam, structural collapse, or theft
- Records and/or storage boxes are not in contact with the floor
- No boxes past retention time present

Recommended Actions

- Use and complete information on the district approved record label
- Use banker boxes for record storage
- Replace worn and/or damaged boxes
- Organize record storage room by shred date
- Increase storage room safety and security
- Seek more appropriate storage options
- Organize box contents and remove clips, binders, etc.
- Replace or repair unsafe shelving
- Remove and shred boxes past retention time

An audit report will be emailed to the location department head and the custodian of record following the audit. The site can request onsite storage assistance and training.

Records Schedule

Below are the header definitions of the District Records Schedule:

- ❖ **Office/Dept.:** The Department in which Records Management has determined the specific records should be maintained.
- ❖ **Record Series #:** Records series item numbers are assigned by the State and Local Records Management Division of the Texas State Library and Archives Commission.
- ❖ **Record Series Title:** The most general titles possible have been chosen.
- ❖ **Subtitle:** Explanations are provided for those titles which are not self-explanatory.
- ❖ **Vital Records:** Vital records are specific records that are essential to resume business or continue an organization, to recreate an agency's financial or legal position, or to preserve the rights of employees and citizens. Records series commonly regarded as vital have been so designated.
- ❖ **Total Retention:** Retention is expressed in the years unless otherwise noted.
- ❖ **Authority/Comments:** This column contains citations to applicable federal or state laws or regulations or other information regarding records retention requirements.

Destruction of Records

DESTRUCTION OF RECORDS

A District record may be intentionally destroyed under any of the following conditions:

1. The record is listed on a records control schedule filed with the State Library and Archives Commission and either its retention period has expired, or it has been microfilmed or electronically stored in accordance with legal standards.
2. The record appears on a list of obsolete records approved by the State Library and Archives Commission.
3. A destruction request is filed with and approved by the State Library and Archives Commission for a record not listed on an approved control schedule.
4. The district court issues an expunction order for the destruction or obliteration of the records, pursuant to state law.
5. The records are defined as exempt from scheduling or filing requirements or listed as exempt in a records retention schedule issued by the State Library and Archives Commission.

Local Gov't Code 202.001

EXCEPTIONS: A District record the subject matter of which is known by the custodian to be the subject of litigation shall not be destroyed until the litigation is settled. A District record that is subject to a request under Chapter 552, Government Code, shall **not** be destroyed until the request is resolved.

Local Gov't Code 202.002

METHOD OF DESTRUCTION

Fort Worth ISD-approved method of destruction is by cross-cut shredding or pulping.

PERSONAL LIABILITY

A custodian of local government records, records management officer, or other officer or employee of a local government may not be held personally liable for the destruction of a local government record if the destruction complies with this subtitle and rules adopted under it.

Contact Information for shredding services:

AMPLIFY Secure Services
5501 Thelin St. #119
Fort Worth, TX 76115
(817) 710-1125

Email:
ben@amplifyfw.org
teri@amplifyfw.org

*Note: A purchase order must be submitted before contacting AMPLIFY for their services.

Record Destruction Years

Two (2) Year Schedule

Year End Date Is on or before June 30th of:	The Destruction date to be written on the box form is July 1:
2016-2017	2019
2017-2018	2020
2018-2019	2021
2019-2020	2022
2020-2021	2023
2021-2022	2024
2022-2023	2025
2023-2024	2026
2024-2025	2027
2025-2026	2028
2026-2027	2029
2027-2028	2030
2028-2029	2031
2029-2030	2032

Three (3) Year Schedule

Year End Date is on or before June 30th of:	The Destruction date to be written on the box form is July 1:
2017-2018	2021
2018-2019	2022
2019-2020	2023
2020-2021	2024
2021-2022	2025
2022-2023	2026
2023-2024	2027
2024-2025	2028
2025-2026	2029
2026-2027	2030
2027-2028	2031
2028-2029	2032
2029-2030	2033
2030-2031	2034

Five (5) Year Schedule

Year End Date is on or before June 30th of:	The Destruction date to be written on the box form is July 1:
2017-2018	2023
2018-2019	2024
2019-2020	2025
2020-2021	2026
2021-2022	2027
2022-2023	2028
2023-2024	2029
2024-2025	2030
2025-2026	2031
2026-2027	2032
2027-2028	2033
2028-2029	2034
2029-2030	2035
2030-2031	2036

Seven (7) Year Schedule

Year End Date is on or before June 30th of:	The Destruction date to be written on the box form is July 1:
2017-2018	2025
2018-2019	2026
2019-2020	2027
2020-2021	2028
2021-2022	2029
2022-2023	2030
2023-2024	2031
2024-2025	2032
2025-2026	2033
2026-2027	2034
2027-2028	2035
2028-2029	2036
2029-2030	2037
2030-2031	2038

Record Storage

Local Government Code Title 6, Subtitle C Section 203.048 Care of Records of Permanent Value

The Fort Worth ISD shall adopt rules establishing standards for the proper care and storage of local government records of permanent and non-permanent value.

RECORDS SHALL BE STORED IN A MANNER THAT COMPLIES WITH THE FOLLOWING:

Offers protection from fire, water, steam, structural collapse, unauthorized access, theft, and other similar hazards; and

1. Does not expose records to direct sunlight.
2. Records or storage boxes shall not be stored in contact with the floor.
3. Records stored in a building or storage area shall be protected by an operational fire detection system or the facility must comply with local fire codes.
4. Records will be stored in district approved boxes.
5. Records will be organized, packed, and labeled in a district approved method.

RECORDS STORAGE BOX REQUIREMENTS:

Standard letter/legal size records storage box specifications are as follows:

1. Order from the FWISD Warehouse – Stock Catalog
2. Order number: 60-1530
3. Unit of Measure: EA
4. Description: BOX, STORAGE (PRE-LABELED) (FITS LEGAL/LTR. SIZE FILES) with Lid
5. Unit Cost: 1.93
6. Can be ordered in a 25-unit bundle

RECORDS STORAGE BOX LABEL REQUIREMENTS:

Standard labeling of records storage box specifications are as follows:

1. Complete the DRM Storage Box Label Order Form
2. Submit an order to DRM
3. DRM will fulfill the order
4. Currently there is no charge for the storage box labels

PACKING RECORDS:

1. Pack only one record series for one year in each box. Records in the same records series, covering the same period, may be added to the box during the year.
 - a. When removing records from file cabinets, keep them in order.
 - b. If filed in numerical order – place the lower number at the front of each box.
 - c. If filed in alphabetical order – begin with “A” in the first box.
2. If records in the file cabinets are not arranged in a logical order that can be used for retrieving files, they must be put in order **before** packing boxes. Staff must be able to locate a file quickly and easily with a box.
3. Place letter and legal-size records upright in the box, as they would normally be arranged in a file drawer.
 - a. Place letter size records in the box facing the front, toward the label.
 - b. Place legal size records in the box lengthwise, facing the left-hand side of the box if viewed from front end the bottom of the page should be toward the label.
4. Storing binders and ledgers in record boxes is not recommended. However, if it is necessary to manage the records efficiently, stack the binders and ledgers on their sides or backs facing the lid of the box. Do not stack above the hand holes.
5. Plastic folders, hanging files, rubber bands, binder clips, and/or other costly filing supplies must be removed prior to storage.

LABEL SAMPLE:

Labels are to be ordered from the District Records Management

 Fort Worth INDEPENDENT SCHOOL DISTRICT District Records Management	BOX#	Storage Box Label	Destruction Year (DRM Use Only)
Department/School #: _____ School Year: _____ Box Number: _____ of _____			
Department/School Name: _____			
Record Series: ☐ EL ☐ GR ☐ HR ☐ TR ☐ SD _____ Record Series #: _____			
Record Series Title: _____			
Range: _____ ☐ Alpha ☐ Numeric ☐ Date ☐ Other			
Total Retention: ☐ 2 Years ☐ 5 Years ☐ 7 Years ☐ Permanent ☐ Other: _____			
Packing Date: _____ Destroy Month: _____ Year: _____			
Description of Contents: _____ _____ _____ _____			

FWISD STORAGE BOX LABEL:

DO NOT make copies of this label. If the official FWISD storage box label is duplicated and placed on the storage boxes, district records management will advise you to relabel each box.

Use a “black” permanent marker to print the required information on the district standard storage box labels. Do not use red, purple, or other bright colors, as they tend to fade over time.

RECORDS STORAGE BOX LABEL REQUIREMENTS:

Standard labeling of records storage box specifications are as follows:

1. Complete DRM Storage Box Label Order Form
2. Submit order for to DRM
3. DRM will fulfill the order
4. Currently there is no charge for the storage box labels

Instructions for completing each field on the FWISD record storage box label are described as follows:

1. **Department/School #:** enter your department/school number
Example: Department – DRMO = 411 or Carter-Riverside = 001
2. **School Year:** enter the year the records were produced
Example: 2014/2015
3. **Box Number:** the box number indicates the number of boxes in a consecutive series
Example: Box Number: 1 of 5
4. **Department/School Name:** enter the full department/school's name
Example: District Records Management Office / Carter-Riverside
5. **Record Series:** select the record series SD, GR, PW, TX, AR – The record series number is the same information as the records series number in the FWISD Records Control Schedule.
6. **Records Series Number:** write the records series number that corresponds to your records. If you have problems locating the record series number on the FWISD Records Control Schedule, contact the District Records Management Office.
Example: SD3275-01a
7. **Record Series Title:** *Example: Attendance Control Documentation*
8. **Range:** additional information to describe the contents of the box in more detail. A range can be alpha, numerical, date, grade level, etc.

Example:

Alphabetical	Numerical	Date	Other
A-K	1782-2912	Oct-Dec	1 st – 3 rd six weeks
L-Z	1 st – 4 th	02/2007 – 04/2007	1 st period – 6 th period
ACK-ZUN	400-600	03/01/2004 - 03/31/2004	6 th grade – 8 th grade

9. **Range Selection:** select Alpha (Alphabetical), Numeric (Numerical), Date, Other
10. **Total Retention:** select the required retention years.
11. **Packing Date:** the date the box was packed with records.

Example: September 2015 - 10/17/2015 - May 23, 2016

12. **Spreadsheet Box Number:** the month to dispose of the records. (This field may be left blank)
13. **Destroy Year:** the year to dispose of the records. Calculate based on the date of the records and the requirements according to the records control schedule or governing authority such as state or federal regulations. Refer to pages 24-27 for the year destruction calculation.

Example: 2007, 2012, 2023 or PERMANENT

14. **Description of Contents:** a good description should sufficiently identify the contents of the box without opening the container.

Example:

Good Description: Daily Registers of Pupil Attendance
Parent/Doctor Notes for Attendance
Administrator Notes for Attendance

Poor Description: Records
Rob Van Winkle files
Office Files

DO NOT store the following: Remove all documents from binders, remove binder clips, rubber bands, and hanging file folders.

Storage File Cabinet Label

Department/School #: _____ School Year: ____/____ Drawer #: _____ of _____

Department/School Name: _____

Record Series: EL GR PW TX SD Record Series #: _____

Record Series Title: _____

Range: _____ ☐ Alpha ☐ Numeric ☐ Date ☐ Other

Total Retention: 2 Years 5 Years 7 Years Permanent Other: _____

Packing Date: _____ Spreadsheet Box Number: _____

Description of Contents: _____

FWISD STORAGE FILE CABINET LABEL:

Use a “black” permanent marker to print the required information on the district standard STORAGE FILE CABINET labels. Do not use red, purple, or other bright colors, as they have tendency to fade over time.

RECORDS STORAGE FILE CABINET LABEL REQUIREMENTS:

Standard labeling of records STORAGE FILE CABINET specifications are as follows:

1. Complete DRM Storage Box Label Order Form
2. Submit order for to DRM
3. DRM will fulfill the order
4. At this time there is no charge for the storage box labels

Instructions for completing each field on the FWISD record storage box label are described as follows:

1. **Department/School #:** enter your department/school number
Example: Department – DRMO = 411 or Carter-Riverside = 001
2. **School Year:** enter the year the records were produced
Example: 2014/2015
3. **Drawer Number:** the drawer number indicates the number of drawers in a consecutive series.
Example: Drawer Number: 1 of 5
4. **Department/School Name:** enter the full department/school's name
Example: District Records Management Office / Carter-Riverside
5. **Record Series:** select the record series EL, SD, GR, PW, TX – The record series number is the same information as the records series number in the FWISD Records Control Schedule.
6. **Records Series Number:** write the records series number that corresponds to your records. If you have problems locating the record series number on the FWISD Records Control Schedule, contact the District Records Management Office.
Example: SD3275-01a
7. **Record Series Title:** *Example: Attendance Control Documentation*
8. **Range:** additional information to describe the contents of the box in more detail. A range can be alpha, numerical, date, grade level, etc.

Example:

Alphabetical	Numerical	Date	Other
A-K	1782-2912	Oct-Dec	1 st – 3 rd six weeks
L-Z	1 st – 4 th	02/2007 – 04/2007	1 st period – 6 th period
ACK-ZUN	400-600	03/01/2004 - 03/31/2004	6 th grade – 8 th grade

9. **Range Selection:** select Alpha (Alphabetical), Numeric (Numerical), Date, Other
10. **Total Retention:** select the required retention years.
11. **Packing Date:** date the records were filed in the cabinet.

Example: September 2015 - 10/17/2015 - May 23, 2016

12. **Spreadsheet:** the month to dispose of the records. (*This field may be left blank*)
13. **Destroy Year:** the year to dispose of the records. Calculate based on the date of the records and the requirements according to the records control schedule or governing authority such as state or federal regulations. Refer to pages 24-27 for year destruction calculation.

Example: 2007, 2012, 2023 or PERMANENT

14. **Description of Contents:** a good description should sufficiently identify the contents of the box without opening the container.

Example:

Good Description:	Daily Registers of Pupil Attendance Parent/Doctor Notes for Attendance Administrator Notes for Attendance
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Poor Description:	Records Rob Van Winkle files Office Files
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DO NOT store the following: Remove all documents from binders, remove binder clips, rubber bands, and hanging file folders.

FWISD FILE CABINET “DON'TS”

NO BINDERS



NO BINDERS



NO PLASTIC FILE FOLDERS



NO BINDER CLIPS



FWISD STORAGE BOX “DON'TS”

NO HANGING FILES



NO BINDERS



NO UNAUTHORIZED STORAGE BOXES



DO NOT OVER-PACK BOXES



NON-RECORD MATERIALS

Note: *Non-record materials should not be mixed with “official” records.*

The following items (but not limited to) are generally **NOT** records.

1. Stocks of publications and printed brochures that are not originals.
2. Library material acquired and preserved for reference, including textbooks, periodicals, and other technical reference materials.
3. Unsolicited announcements, invitations or other materials not filed as evidence of business activity or production operations.
4. Preliminary drafts, worksheets, memoranda, and informal notes which do not represent significant steps in the preparation of record documents.
5. Routing slips that contain no pertinent information or approvals used to direct the distribution of papers and correspondence.
6. Personal property such as employee’s own copies of personnel file, certificates, training documentation, etc.
7. Extra copies of records in addition to “official” records contained elsewhere. Duplicate copies of records maintained as reading, convenience, tickler, and identical copies maintained with the “official” records are non-records if they are maintained only for reference and convenience and do not contain additional information.
8. Blank forms, file and office supplies, or other items that can be found in the store’s warehouse.
9. Papers belonging to another office or file station — they should be routed appropriately.
10. Junk mail.

Records Quick Reference - SD

SD – “School District” Records

Record Series	Record Title
SD3200	PART 1: STUDENT ACADEMIC RECORDS
SD3225	PART 2: FAMILY EDUCATIONAL RIGHTS AND PRIVACY ACT RECORDS
SD3250	PART 3: RECORDS OF SPECIAL POPULATIONS AND SERVICES
SD3275	PART 4: ATTENDANCE RECORDS
SD3300	PART 5: STUDENT HEALTH RECORDS
SD3325	PART 6: INSTRUCTION AND GRADE REPORTING
SD3350	PART 7: DISCIPLINE AND COUNSELING RECORDS
SD3375	PART 8: ADULT AND VOCATIONAL EDUCATION RECORDS
SD3400	PART 9: DRIVERS EDUCATION RECORDS
SD3425	PART 10: ACCREDITATION RECORDS
SD3450	PART 11: FOOD SERVICE RECORDS
SD3475	PART 12: TEXTBOOK RECORDS
SD3500	PART 13: SCHOOL TRANSPORTATION RECORDS
SD3525	PART 14: SCHOOL SAFETY RECORDS
GR1025	PART 15: FINANCIAL RECORDS
SD3575	PART 16: PERSONNEL AND STAFFING RECORDS
SD3600	PART 17: MISCELLANEOUS REPORTS AND SURVEYS
SD3625	PART 18: MISCELLANEOUS RECORDS
SD3650	PART 19: LIBRARY RECORDS

PART 1: STUDENT ACADEMIC RECORDS

Retention Notes: 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 only as long as administratively valuable.

SD3200-01a	Academic Records		SD3200-01b	Academic Records
SD3200-02	Birth Date Documentation		SD3200-03	Custody Documents
SD3200-04	Enrollment or Registration Forms		SD3200-05	Home Language Surveys
SD3200-06	Missing Child Prevention and Identification Program Records		SD3200-06a	Missing Child Prevention and Identification Program Records
SD3200-06b	Missing Child Prevention and Identification Program Records		SD3200-06c	Missing Child Prevention and Identification Program Records
SD3200-07	Parental Permission Records		SD3200-08	Student Withdrawal/Record Transfer Form
SD3200-09a	Test and Academic Measurement Reports		SD3200-09b	Test and Academic Measurement Reports
SD3200-09c	Test and Academic Measurement Reports		SD3200-10	Ethnicity Forms
SD3200-11	Statement of Assurance for Students who are Victims of a Violent Criminal Act			

PART 2: FAMILY EDUCATIONAL RIGHTS AND PRIVACY ACT RECORDS

SD3225-01	Access Policies		SD3225-02	Access to Information, Records Of
SD3225-02a	Access to Information, Records Of		SD3225-02b	Access to Information, Records Of
SD3225-02C	Access to Information, Records Of		SD3225-02d	Access to Information, Records Of
SD3225-03	Protest of Record Statements		SD3225-04	Record Amendments Requests & Related Documentation

PART 3: RECORDS OF SPECIAL POPULATIONS AND SERVICES

Retention Notes: 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 determination against enrollment is made.

Section 3-1: Special Education Program Records

SD3250-01	Special Education - Enrollment Lists and Rosters		SD3250-02	Special Education Student Records
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Section 3-2: Bilingual and Special Language Program Records

SD3250-08	Bilingual and Special Language Program Records			
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Section 3-3: Gifted/Talented Program Records

SD3250-16	Gifted/Talented Program Records			
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Section 3-4: Section 504 Program Records

SD3250-20	Section 504 Program Records			
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Section 3-5: Dyslexia Program Records

SD3250-26	Enrollment List and Rosters		SD3250-27	Dyslexia Program Records
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Section 3-6: Migrant Student Record Transfer System (MSRTS) Records

SD3250-33	Migrant Student Record Transfer System (MSRTS) Records		SD3250-34	Migrant Student Record Transfer System (MSRTS) Records
SD3250-35	Migrant Student Record Transfer System (MSRTS) Records - Monitoring Documentation		SD3250-36	Migrant Student Record Transfer System (MSRTS) Records - Recruiting Records
SD3250-37a	Migrant Student Record Transfer System (MSRTS) Records		SD3250-37b	Migrant Student Record Transfer System (MSRTS) Records
SD3250-37c	Migrant Student Record Transfer System (MSRTS) Records			

Section 3-7: Other Special Populations Records

SD3250-43	Federal Impact Aid Survey Forms		SD3250-43a	Federal Impact Aid Survey Forms
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SD3250-43b	Federal Impact Aid Survey Forms		SD3250-44	McKinney Homeless Assistance Act Student Record
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PART 4: ATTENDANCE RECORDS

SD3275-01a	Attendance Control Documentation		SD3275-01b	Attendance Control Documentation
SD3275-01c	Attendance Control Documentation		SD3275-01d	Attendance Control Documentation
SD3275-02a	Attendance Reports		SD3275-02b	Attendance Reports
SD3275-03	Scholastic Census Record		SD3275-04	Transfer, Applications for, and Associated Reports

PART 5: STUDENT HEALTH RECORDS

SD3300-01	Student Health Records - Accident Reports		SD3300-02	Student Health Records - Activity and Statistical Reports
SD3300-03	Student Health Records		SD3300-04	Student Health Records
SD3300-05	Student Health Records		SD3300-06	Student Health Records - Exclusion & Verification
SD3300-06a	Student Health Records - Exclusion & Verification		SD3300-06b	Student Health Records - Exclusion & Verification
SD3300-06c	Student Health Records - Exclusion & Verification		SD3300-07a	Health Screening Documentation
SD3300-07b	Health Screening Documentation		SD3300-08a	Immunization Records
SD3300-08b	Immunization Records		SD3300-09	Student Health Records
SD3300-10	Reports to Enforcement Agencies		SD3300-11a	Special Health Care Records
SD3300-11b	Special Health Care Records			

PART 6: INSTRUCTION AND GRADE REPORTING

SD3325-01	Curriculum Guides		SD3325-02	Grade Books
SD3325-02	Grade Books		SD3325-03	Grade Reports
SD3325-04	Lesson Plans		SD3325-05	Report Cards

PART 7: DISCIPLINE AND COUNSELING RECORDS

SD3350-01	Discipline Records		SD3350-01a	Discipline Records
SD3350-01b	Discipline Records		SD3350-03	Law Enforcement Notifications

SD3350-02	Student Guidance and Counseling Files			
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PART 8: ADULT AND VOCATIONAL EDUCATION RECORDS

SD3375-01	Class Organization Reports and Rosters		SD3375-02	Curriculum Planning Documentation
SD3375-03	Follow-Up Reports		SD3375-04	Student Records

PART 9: DRIVERS EDUCATION RECORDS

SD3400-01	Drivers Education Records - Student Records		SD3400-01	Drivers Education Records - Student Records
SD3400-02	Drivers Education Records - Student Rosters		SD3400-03	Drivers Education Records - Instructional Checklist
SD3400-04	Drivers Education Records - Licensing and Completion Forms		SD3400-05	Drivers Education Records

PART 10: ACCREDITATION RECORDS

SD3425-01a	Accreditation Reports		SD3425-01b	Accreditation Reports
SD3425-02	Accreditation Reports - Planning Records			

PART 11: FOOD SERVICE RECORDS

SD3450-01	Certificates of Authority		SD3450-02	Daily Food Service Records
SD3450-03	Food & Food Inventory Records		SD3450-04a	Free or Reduced-Price Meal Records
SD3450-04b	Free or Reduced-Price Meal Records		SD3450-04c	Free or Reduced-Price Meal Records
SD3450-05	Health Inspection Reports		SD3450-06a	Menu Records
SD3450-06b	Menu Records			

PART 12: TEXTBOOK RECORDS

SD3475-01	Textbook Records		SD3475-02	Textbook Records
SD3475-03	Textbook Records		SD3475-04a	Textbook Records
SD3475-04b	Textbook Records		SD3475-04c	Textbook Records
SD3475-04d	Textbook Records		SD3475-05a	Textbook Procurement Records
SD3475-05b	Textbook Procurement Records		SD3475-05c	Textbook Procurement Records
SD3475-06a	Textbook Sales and Disposition Records		SD3475-06b	Textbook Sales and Disposition Records

PART 13: SCHOOL TRANSPORTATION RECORDS

SD3500-01	School Transportation Records		SD3500-02	School Transportation Records
SD3500-03	Drivers Records		SD3500-03a	Drivers Records
SD3500-03b	Drivers Records		SD3500-03c	Drivers Records
SD3500-04	Eligible Rider Documentation		SD3500-05	Pupil Transportation Reports
SD3500-06	Route Descriptions		SD3500-07a	School Transportation Cost and Maintenance Records
SD3500-07b	School Transportation Cost and Maintenance Records		SD3500-07c	School Transportation Cost and Maintenance Records
SD3500-07d	School Transportation Cost and Maintenance Records		SD3500-07e	School Transportation Cost and Maintenance Records
SD3500-08	School Transportation Cost and Maintenance Records		SD3500-09a	School Bus Surveillance Video (no incident)
SD3500-09b	School Bus Surveillance Video (incident)		GR1050-02	APTITUDE & SKILL TEST RESULTS

PART 14: SCHOOL SAFETY RECORDS

SD3525-01	School Safety Records		SD3525-02	Fire Drill Records
SD3525-03	Fire Safety Inspection Reports			

PART 15: FINANCIAL RECORDS

Retention Notes: This part supplements and should be used with Part 2 of Local Schedule GR.

GR1025-07a	FINANCIAL REPORTS MONTHLY, QUARTERLY, SEMI-ANNUAL			
GR1025-07b	FINANCIAL REPORTS ANNUAL REPORTS			

PART 16: PERSONNEL AND STAFFING RECORDS

Part 3 of Local Schedule GR. b) If the retention period for a period **Retention Notes:** a) This part supplements and should be used in conjunction with 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 related ceases employment before supersession occurs, the date of separation shall also be considered the date of supersession for records retention purposes.

Section 16-1: Individual Employee Records

SD3575-01	Personnel and Staffing Records		SD3575-02	Applications and Recommendations for Professional or Paraprofessional
SD3575-02a	Applications and Recommendations for Professional or Paraprofessional Certificates or Permits, Copies of		SD3575-02b	Applications and Recommendations for Professional or Paraprofessional Certificates or Permits, Copies of
SD3575-03	Audit Verification Cards		SD3575-04	Deficiency Plan
SD3575-05	Performance Appraisal Records (Career Ladder System)		SD3575-05a	Performance Appraisal Records (Career Ladder System)
SD3575-05b	Performance Appraisal Records (Career Ladder System)		SD3575-05c	Performance Appraisal Records (Career Ladder System)
SD3575-05d	Performance Appraisal Records (Career Ladder System)		SD3575-05e	Performance Appraisal Records (Career Ladder System)
SD3575-05f	Performance Appraisal Records (Career Ladder System)		SD3575-06	Service Record Affidavits
SD3575-07	Statements of Commitments		SD3575-08	Statements of Intention to Become a US Citizen
SD3575-09	Teacher Certificate Registers		SD3575-10	Tuberculosis Certificates
SD3575-11	Criminal History Checks			

Section 16-2: Staffing Records

SD3575-16	Personnel Rosters		SD3575-17	Personnel Unit Requirement Calculation Worksheets
SD3575-18	Substitute Teaching Rosters			

PART 17: MISCELLANEOUS REPORTS AND SURVEYS

SD3600-01-1	PEIMS Data Submission		SD3600-02	Data Verification Reports
SD3600-03	Surveys			

PART 18: MISCELLANEOUS RECORDS

SD3625-01	Program Approval Applications		SD3625-01a	Program Approval Applications
SD3625-01b	Program Approval Applications		SD3625-02	Requests for Waiver of TEA Policies and Rules
SD3625-02a	Requests for Waiver of TEA Policies and Rules		SD3625-02b	Requests for Waiver of TEA Policies and Rules
SD3625-03	School Calendar		SD3625-04	UIL Records
SD3625-05	Extracurricular Activity Records		SD3625-06a	Student Drug/Alcohol Test
SD3625-06b	Student Drug/Alcohol Test		SD3625-07	Visitor Logs
SD3625-08	Parking Decal/Permit Records			

PART 19: LIBRARY RECORDS

SD3650-01	Accession/Deaccession Records		SD3650-02	Borrower Registration Records
SD3650-03	Circulation Records		SD3650-04	Interlibrary Loan Records
SD3650-05	Inventory Records		SD3650-06	Library Catalogs

Records Quick Reference - GR

GR – “Government” Records

Record Series	Record Title
GR1000	PART 1: ADMINISTRATIVE RECORDS
GR1025	PART 2: FINANCIAL RECORDS
GR1050	PART 3: PERSONNEL AND PAYROLL RECORDS
GR1075	PART 4: SUPPORT SERVICES RECORDS
GR5750	Section 4-4: Workplace Safety Records
GR5800	PART 5: INFORMATION TECHNOLOGY RECORDS
GR5825	Section 5-2: Computer Operation and Technical Support Records

PART 1: ADMINISTRATIVE RECORDS

Retention Note: SCOPE OF SECTION - The retention periods established in this section also apply to the records of subsidiary boards, bureaus, commissions, or committees established by the governing body of a local government that have rulemaking or quasi-judicial authority over any activity or program of the government or that were established by ordinance, order, or resolution for the purposes of advising the governing body or a subsidiary body on policy. Consequently, the use of the term “governing body” in a records description includes the corresponding records of those subsidiary bodies.

Section 1-1: Records of Governing Bodies

GR1000-01a	Agendas		GR1000-01b	Agendas
GR1000-02	Dedications		GR1000-03	Minutes
GR1000-03a	Minutes		GR1000-03b	Minutes
GR1000-03c	Minutes		GR1000-03d	Minutes
GR1000-03e	Minutes		GR1000-03f	Minutes
GR1000-03g	Minutes		GR1000-04	Open Meeting Notices
GR1000-05	Official Orders, Resolutions, or Proclamations		GR1000-06	Petitions
GR1000-07	Proclamations		GR1000-08	Speeches, Papers, and Presentations

Section 1-2: General Records

GR1000-20	Accident Reports	GR1000-20a	Accident Reports
GR1000-20b	Accident Reports	GR1000-21a	Affidavits of Publication
GR1000-21b	Affidavits of Publication	GR1000-21c	Affidavits of Publication
GR1000-22	Annexation, Dis-annexation, Abolition, and Other Jurisdictional Records	GR1000-23	Charters
GR1000-24	Complaints	GR1000-25	Contracts, Leases, and Agreements
GR1000-26	Correspondence, Internal Memoranda, and Subject Files	GR1000-26a	Correspondence, Internal Memoranda, and Subject Files
GR1000-26b	Correspondence, Internal Memoranda, and Subject Files	GR1000-26c	Correspondence, Internal Memoranda, and Subject Files
GR1000-27	Deeds	GR1000-28	Easements
GR1000-29	Insurance Policies	GR1000-30	Legal Opinions
GR1000-31	Litigation Case Files	GR1000-32	Minutes (STAFF)
GR1000-33	Public Relations Records	GR1000-34	Public Information Act Requests
GR1000-34a	Public Information Act Requests	GR1000-34b	Public Information Act Requests
GR1000-35	Organizational Charts	GR1000-36	Permits and Licenses
GR1000-37	Photographs, Recordings, and other Non-Textual Media	GR1000-38	Policy and Procedure Documentation
GR1000-39	Publications	GR1000-40a	Records Management Records
GR1000-40b	Records Management Records	GR1000-40c	Records Management Records
GR1000-40d	Records Management Records	GR1000-41a	Reports and Studies (Non-Fiscal)
GR1000-41b	Reports and Studies (Non-Fiscal)	GR1000-42	Waivers of Liability
GR1000-43	Conflicts Disclosure Statements and Conflict of Interest Questionnaires	GR1000-44	Local Government Officer, Lists of:
GR1000-45	Calendars, Appointments, and Itinerary Records	GR1000-46	Insurance Claims
GR1000-47	Customer Surveys	GR1000-50	Transitory Information

PART 2: FINANCIAL RECORDS

Retention Notes: AUDIT REQUIREMENTS - Most local governments are required by state law to conduct annual or biennial audits of their records and accounts. These audit requirements were taken into account in setting the retention periods in this schedule. The following retention rules also apply:

1) In any local government for which there is no statutory audit requirement and audits are conducted irregularly or in a local government in which a statutorily required audit is delayed, any record in this schedule whose retention period dates from the end of a fiscal year (FE) must be retained for the retention period stated or one year after an audit, whichever later.

2) With regard to any special fund of a local government or elective county office for which there is no statutory audit requirement and the fund is not audited, any records listed under item numbers GR1025-26, GR1025-27, GR1025-28, and GR1025-30 associated with receipts and disbursements from or to the fund must be retained for FE + 10 years.

Section 2-1: Fiscal Administration and Reporting Records

GR1025-01a	Fiscal Audit Records (by both internal and external auditors)	GR1025-01b	Fiscal Audit Records (by both internal and external auditors)
GR1025-01c	Fiscal Audit Records (by both internal and external auditors)	GR1025-01d	Fiscal Audit Records (by both internal and external auditors)
GR1025-001e	Fiscal Audit Records (by both internal and external auditors)	GR1025-02	Bank Security Records
GR1025-03	Bond Records	GR1025-03a	Bond Records
GR1025-03b	Bond Records	GR1025-03c	Bond Records
GR1025-03d	Bond Records	GR1025-04a	Budgets and Budget Documentation
GR1025-04b	Budgets and Budget Documentation	GR1025-04c	Budgets and Budget Documentation
GR1025-04d	Budgets and Budget Documentation	GR1025-04e	Budgets and Budget Documentation
GR1025-05	Capital Assets Records	GR1025-05a	Capital Assets Records
GR1025-05b	Capital Assets Records	GR1025-05c	Capital Assets Records
GR1025-05d	Capital Assets Records	GR1025-06	Federal Revenue Sharing Records

GR1025-07	Financial Reports		GR1025-07a	Financial Reports
GR1025-07b	Financial Reports		GR1025-07c	Financial Reports
GR1025-07d	Financial Reports		GR1025-08	Grant Development and Administrative Records
GR1025-08a	Grant Development and Administrative Records		GR1025-08b	Grant Development and Administrative Records
GR1025-08c	Grant Development and Administrative Records		GR1025-08d	Grant Development and Administrative Records
GR1025-09a	Investment Transaction Records		GR1025-09b	Investment Transaction Records
GR1025-10	Charge Schedules and Price Lists			

Section 2-2: Accounting Records

Retention Notes: a) ACCOUNTING RECORDS OF MOTOR VEHICLE AND BOAT LICENSING AND REGISTRATION - For accounting and banking records relating to motor vehicle licensing not noted in this part, use Part 3 of Local Schedule TX.

GR1025-25	Accounting Policies and Procedures Documentation		GR1025-26a	Accounts Payable and Disbursement Records
GR1025-26b	Accounts Payable and Disbursement Records		GR1025-26c	Accounts Payable and Disbursement Records
GR1025-26d	Accounts Payable and Disbursement Records		GR1025-27	Accounts Receivable Records
GR1025-27a	Accounts Receivable Records		GR1025-27b	Accounts Receivable Records
GR1025-27c	Accounts Receivable Records		GR1025-27d	Accounts Receivable Records
GR1025-27e	Accounts Receivable Records		GR1025-29	Cost Allocation and Distribution Records
GR1025-28	Banking Records			
GR1025-30	Ledgers, Journals, and Entry Documentation		GR1025-30a	Ledgers, Journals, and Entry Documentation
GR1025-30b	Ledgers, Journals, and Entry Documentation		GR1025-30c	Ledgers, Journals, and Entry Documentation
GR1025-30d	Ledgers, Journals, and Entry Documentation		GR1025-31	Transaction Summaries
GR1025-31b	Transaction Summaries		GR1025-31c	Transaction Summaries
GR1025-31d	Transaction Summaries		GR1025-32	Unclaimed Property Documentation

PART 3: PERSONNEL AND PAYROLL RECORDS

Retention Notes: a) **FEDERAL RETENTION REQUIREMENTS** - Federal retention periods for personnel and payroll records arise principally from the administration of the Civil Rights Act of 1964, Title VII; the Age Discrimination and Employment Act of 1967; the Equal Pay Act; the Fair Labor Standards Act; the Federal Insurance Contribution Act; and the Federal Unemployment Tax Act. Various federal agencies or departments of agencies administer these acts and because retention periods are set to enable each agency to carry out its oversight authority, different retention periods are often established for the same record. In compiling Schedule GR, the longest applicable federal retention period is cited as authority for the retention period indicated. A federal regulation is not cited if a state law or regulation requires a longer retention period. A federal retention period is also not cited if a Texas statute of limitations makes a longer retention period advisable. For example, the federal retention requirement for employment contracts [see item number GR1050-15(a)] is given as 3 years from the last effective date of the contract in 26 CFR 516.5, but suits in Texas may be brought by either party to such a contract within four years of the occurrence of an alleged breach; therefore a retention period of 4 years from the last effective date of the contract is set in this schedule. All retention periods in this part apply, by authority of this schedule, to all local governments, although some of them may be otherwise exempt from the federal requirement cited. This provision does not require the creation by exempted local governments of any special documentation demonstrating compliance with federal regulations that may be required of non-exempted governments.

b) **PERSONNEL FILES** - The individual employee personnel file is not scheduled as a unit in this section; documents normally placed in such files are scheduled separately.

c) **TERMINATED EMPLOYEES** - Notwithstanding any retention periods in this part, all personnel records existing on the date of termination of an involuntarily terminated employee must be retained for 2 years from the date of termination [29 CFR 1602.31, 1602.40, and 1602.49].

d) **JTPA AND CETA EMPLOYEES** - Any records maintained on applicants for, or holders of positions paid in whole or in part from Comprehensive Employees' Training Act (CETA) funds or affirmative action apprenticeship program funds administered by the U. S. Department of Labor must be retained for 5 years from the date of enrollment in the program. [29 CFR 30.8(e)]. This 5-year retention period is extended by the authority of this schedule to comparable records on applicants for or holders of positions paid in whole or in part from Job Training Partnership Act (JTPA) funds.

e) **DEFINITION OF EMPLOYEE** - For this part, the term "employee" also includes elected or appointed officials of a local government who are paid wages or a salary from any funds of the local government and anyone voluntarily working or not receiving payment or compensation for working.

Section 3-1: Personnel Records

GR1050-01a	Affirmative Action Plans		GR1050-01b	Affirmative Action Plans
GR1050-02	Aptitude and Skills Test Records		GR1050-02a	Aptitude and Skills Test Records
GR1050-02b	Aptitude and Skills Test Records		GR1050-02c	Aptitude and Skills Test Records
GR1050-02d	Aptitude and Skills Test Records		GR1050-03	Awards and Commendations
GR1050-04	Certificates and Licenses		GR1050-05	Conflict of Interest Affidavits
GR1050-06a	Counseling Program Records		GR1050-06b	Counseling Program Records
GR1050-07	Disciplinary and Adverse Action Records		GR1050-08	Employee Pension and Benefits Records
GR1050-08a	Employee Pension and Benefits Records		GR1050-08b	Employee Pension and Benefits Records
GR1050-08c	Employee Pension and Benefits Records		GR1050-09	Employee Recognition Records
GR1050-10a	Employee Security Records		GR1050-10b	Employee Security Records
GR1050-11	Employee Selection Records		GR1050-12	Employee Service Record
GR1050-13	Employment Advertisements or Announcements		GR1050-14	Employment Applications
GR1050-14a	Employment Applications		GR1050-14b	Employment Applications
GR1050-15a	Employment Contract/Collective Bargaining Records		GR1050-15b	Employment Contract/Collective Bargaining Records
GR1050-16a	Equal Employment Opportunity Records and Reports		GR1050-16b	Equal Employment Opportunity Records and Reports
GR1050-16c	Equal Employment Opportunity Records and Reports		GR1050-17	Equal Pay Records
GR1050-18	Fidelity Bonds		GR1050-19	Fingerprint Cards
GR1050-20	Grievance Records		GR1050-21	Job Evaluations (Performance Appraisals)
GR1050-22a	Medical and Exposure Reports		GR1050-22b	Medical and Exposure Reports - Periodic

GR1050-22c	Medical and Exposure Reports		GR1050-22d	Medical and Exposure Reports - Periodic
GR1050-23	Oaths of Office		GR1050-24	Personnel Action or Information Notices
GR1050-25	Personnel Studies and Surveys		GR1050-26a	Position Description, Classification, and Staff Monitoring Records
GR1050-26b	Position Description, Classification, and Staff Monitoring Records		GR1050-26c	Position Description, Classification, and Staff Monitoring Records
GR1050-27	Reduction in Force Plans (including any related implementation documentation)		GR1050-28	Training and Educational Achievement Records
GR1050-28a	Training and Educational Achievement Records		GR1050-28b	Training and Educational Achievement Records
GR1050-28c	Training and Educational Achievement Records		GR1050-28d	Training and Educational Achievement Records
GR1050-29	Unemployment Compensation Claims Records		GR1050-30	Verification of Employment Eligibility (INS Form I-9)
GR1050-31	Work Schedules		GR1050-32	Workers Compensation Claim Records
GR1050-33	Financial Disclosure Statements		GR1050-34	Public Access Option Forms
GR1050-35	Employee Exit Interviews		GR1050-36	Criminal History Checks
GR1050-37	Employee Acknowledgement Forms		GR1050-38	Unsolicited Resumes
GR1050-39	Volunteer Service Files			

Section 3-2: Payroll Records

Retention Note: OTHER ACCOUNTING RECORDS - This section supplements Section 2-2 and schedules financial and accounting records found in most local governments specific to the disbursement of payroll. If a payroll-related record is not scheduled in this section, use Section 2-2 for the comparable record; e.g., payroll fund reconciliations should be retained for FE + 5 years under the retention for Banking Records (see item number GR1025-28).

GR1050-50	Deduction Authorizations		GR1050-51	Direct Deposit Applications/ Authorizations
GR1050-52a	Earnings and Deduction Records		GR1050-52b	Earnings and Deduction Records
GR1050-52c	Earnings and Deduction Records		GR1050-52d	Earnings and Deduction Records
GR1050-52e	Earnings and Deduction Records		GR1050-52f	Earnings and Deduction Records
GR1050-53a	Federal and State Tax Forms and Reports		GR1050-53b	Federal and State Tax Forms and Reports
GR1050-54a	Leave Records		GR1050-54b	Leave Records
GR1050-54c	Leave Records		GR1050-54d	Leave Records
GR1050-55	Payroll Action or Information Notices		GR1050-55a	Payroll Action or Information Notices
GR1050-55b	Payroll Action or Information Notices		GR1050-56	Time and Attendance Reports
GR1050-57	Time Change Records		GR1050-58	Requests and Authorizations to Engage in Reimbursable Activities
GR1050-59a	Wage and Salary Tables		GR1050-59b	Wage and Salary Tables

PART 4: SUPPORT SERVICES RECORDS

Section 4-1: Purchasing Records

Retention Notes: RELATIONSHIP WITH ACCOUNTS PAYABLE RECORDS - In a local government in which purchasing and accounts payable records (see item number 1025-26) are maintained by the same individual or department, duplicate copies of a record need not be created and/or retained to satisfy the retention requirements of this section if the record is used in documenting both the ordering and procurement of and payment for goods and services. In such instances, retention requirements for accounts payable records prevail over those noted in this section.

GR1075-01a	Bids and Bid Documentation		GR1075-01b	Bids and Bid Documentation
GR1075-01c	Bids and Bid Documentation		GR1075-01d	Bids and Bid Documentation
GR1075-02	Inventory Records (Parts and Supplies)		GR1075-03a	Purchase Order and Receipt Records
GR1075-03b	Purchase Order and Receipt Records		GR1075-03c	Purchase Order and Receipt Records
GR1075-03d	Purchase Order and Receipt Records			

Section 4-2: Facility, Vehicle, and Equipment Management Records

GR1075-15	Accident and Damage Reports (Property)		GR1075-16a	Construction Project Records
GR1075-16b	Construction Project Records		GR1075-16c	Construction Project Records
GR1075-18	Maintenance, Repair, and Inspection Records		GR1075-18a	Maintenance, Repair, and Inspection Records
GR1075-18b	Maintenance, Repair, and Inspection Records		GR1075-19	Service Requests/Work Orders (for repairs and maintenance to facilities, vehicles, or equipment)
GR1075-20	Usage Reports		GR1075-20a	Usage Reports - Reports of usage of facilities, vehicles, and equipment
GR1075-20b	Usage Reports - Reports of usage of facilities, vehicles, and equipment		GR1075-20c	Usage Reports - Reports of usage of facilities, vehicles, and equipment
GR1075-21	Vehicle or Equipment Assignment Records		GR1075-22	Visitor Control Registers
GR1075-23	Warranties (for vehicles and equipment)		GR1075-24	Vehicle Titles and Registration

Section 4-3: Communications Records

GR1075-40a	Postal and Delivery Service Records		GR1075-40b	Postal and Delivery Service Records
GR1075-41	Telephone Logs or Activity Reports		GR1075-41a	Telephone Logs or Activity Reports
GR1075-41b	Telephone Logs or Activity Reports		GR1075-41c	Telephone Logs or Activity Reports
GR1075-42	E-Rate Records			

Section 4-4: Workplace Safety Records

GR5750-01	Bloodborne Pathogen Training Records		GR5750-02	Facility Chemical Lists
GR5750-04	Hazardous Materials Training Records		GR5750-05	Material Safety Data Sheets (MSDS)
GR5750-06	Workplace Chemical Lists			

PART 5: INFORMATION TECHNOLOGY RECORDS

Retention Notes: (a) This part establishes retention periods for records essential to the creation, maintenance, and use of electronic records (information recorded in a form for computer processing including data, graphics, digital images, multi-media records, etc.) and records related to computer operations/technical support not covered elsewhere in this schedule. Records in this part may be maintained on whatever medium is appropriate including electronic (on-line, magnetic tape, optical disk, CD-ROM, etc.), paper, and microform.

(b) Other types of records may be maintained electronically that are listed elsewhere in this schedule, such as administrative, fiscal, personnel, and support services records, or in other specialized schedules adopted by the Texas State Library and Archives Commission, such as Local Schedule PS (Records of Public Safety Agencies), Local Schedule HR (Records of Public Health Agencies), etc. The retention period for those electronic records will be as specified under the appropriate records series item number according to the function of the information. For example, if an electronic system were used to maintain encumbrance and expenditure reports, the retention period for these electronic records would be 2 years as specified in item number 1025-04(d). Retention requirements apply to records maintained on all types of electronic systems including mainframe, minicomputer, microcomputer, local-area-network based systems, etc.

(c) Administrative rules of the Texas State Library and Archives Commission (13 TAC 7.71-7.79) require that retention procedures for electronic records with an approved retention of 10 years or more must include provisions for scheduling the disposition of the electronic records as well as related software, documentation, and indexes; and for regular recopying, reformatting, and other necessary maintenance or conversion activities to ensure the retention and stability of electronic records until the expiration of their retention periods.

(d) If automated information is copied to paper or microform to create the official record, the electronic files do not have to be maintained for the full retention period of the record. The added value of electronic files for facilitating retrieval, making queries, providing for automated audit trails, etc., should be carefully reviewed prior to destruction of the electronic files even though there is an official record in another medium.

Section 5-1: Records of Automated Applications

GR5800-01	Audit Trail Records		GR5800-02	Finding Aids, Indexes, and Tracking Systems
GR5800-03	Hardware Documentation		GR5800-04	Master File Records
GR5800-05	Processing Records		GR5800-06	Software Programs
GR5800-08	Technical Documentation			

Section 5-2: Computer Operation and Technical Support Records

GR5825-01	Access Security Records		GR5825-02	Batch Data Entry Control Records
GR5825-03	Chargeback Records to Data Processing Services Users		GR5825-04	Computer Job Schedules and Reports
GR5825-05	Data Processing Policies and Procedures		GR5825-06	Data Processing Planning Records
GR5825-07	Network Systems Disaster Preparedness and Recovery Plans		GR5825-08	Electronic Media Library System Records
GR5825-09	Input Documents		GR5825-10	Network Circuits Inventories
GR5825-11	Network Implementation Records		GR5825-12	Operating System and Hardware Conversion Plans
GR5825-13	Output Records for Computer Production		GR5825-14	Quality Assurance Records
GR5825-15	Project Records		GR5825-15a	Project Records
GR5825-15b	Project Records		GR5825-16	System Activity Monitoring Records
GR5825-17	Electronic Records Training Records		GR5825-18	Internet Cookies
GR5825-19	History Files - Web Sites		GR5825-20	Software Registrations, Warranties, and License Agreements

**FORT WORTH ISD | FOR THE RECORD
DISTRICT RECORDS MANAGEMENT**


Date: _____ School/Dept. #: _____
Name: _____
School/Dept.: _____
Telephone#: _____

I certify these records have met all retention requirements and there is no pending litigation or open records requests.

Custodian of Records Authorization:

Signature: _____
Printed Name: _____

Record Series #	Description of Records	School Year Produced	Number of Boxes
Total Number of Boxes			

Page ____ of ____

Total Number of Boxes

RECORDS MANAGEMENT DEPARTMENT USE ONLY

Destruction Approval: **Approved** **Denied**

Signature: _____ Date: _____

Reason for Denial: _____

Email completed form to: recordsmanagement@fwisd.org

Destruction of Records Form
Page 1

Instructions for Completion of Records Destruction Authorization Form

The Destruction Authorization form should be completed, and two copies are to be made. Submit the original copy to the District Records Management Department (DRM) and retain the second copy for your school/department file. Each request is numerically identified and will be processed once the Records Management Department reviews it.

1. Contact Information -- Complete the name of the person preparing the form, as well as the date, school/department number, name, school/department name, and telephone number.
2. Retention Schedule # -- You must provide the DRM with a retention schedule number for all documents to be destroyed. It is the school/department's responsibility to ensure that all records have met the retention period required by state law. The retention schedules (Records Management Plan for Schools and Records Management for Administrative Departments) can be viewed at the District Records Management Portal Website. Administrative Departments will need to request a copy of the retention schedule that relates to their department from the Records Management Department because the copy on the Website does not contain the retention schedule numbers that are needed.
3. Record Description -- A specific detailed description **must** be given for all records that are requested for destruction. No general description is accepted. *For example: Financial Records would be considered as general. The correct description is as follows: Financial Records -- Payroll Checks.
4. Date Range -- A specific date range must be given for all records. It will determine if records have met their retention period.
5. Number of Boxes -- Specify the number of boxes you have for that category of records and the grand total of boxes to be destroyed
6. Authorization -- Please allow your school/department-assigned Custodian of Records to review and sign the authorization signature located at the top right portion of the form.

The Records Management Department will not schedule or destroy any records without the authorization signature.

Records Management Use Only -- The bottom portion of the form is for Records Management use only. Once the documents have been destroyed, our staff will sign off as destroyed, and a copy will be sent back to your school/department for your records.

Once your form is completed, please email recordsmanagement@fwisd.org for processing. Records Management will then review the request for compliance. If clarification or corrections are not needed, your request will be approved for destruction.



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