



Fredericksburg ISD

Records Retention Reference

DO NOT DESTROY: Records involved in pending litigation, claims, audits, public information requests, administrative review, or another hold must be retained until the action, and all related issues are resolved.

FE = fiscal year end; CE = calendar year end; US = until superseded; LA = life of asset; AV = as long as administratively valuable.

Financial, Purchasing, Contracts and Property Records

Record Type	Retention Period	Schedule / Series
1099 Forms	4 years after tax due date or date tax paid, whichever is later	GR1050-53b
Application (Foundation Funds)	FE + 5 years after grant/project closeout	GR1025-08a/b
Athletic Game/Cash Reports	FE + 5 years	GR1025-27 / SD3625-04
Audit Reports	Permanent	GR1025-01a/d
Audit Work papers	3 years after all audit questions are resolved	GR1025-01e
Bank Statements & Canceled Checks	FE + 5 years	GR1025-28
Bids (successful) & RFPs	FE of award + 5 years; if contract results, 4 years after contract expiration/termination	GR1075-01a / GR1000-25
Bids (unsuccessful)	2 years	GR1075-01b
Bonds: Administrative Records & Registers	Permanent	GR1025-03a/c
Bonds: Cancelled & Coupons	1 year after payment	GR1025-03b
Bonds: Fidelity Bonds	4 years after expiration/termination	GR1000-25
Budget Work Papers	3 years	GR1025-04c
Budgets and amendments (Official)	Permanent	GR1025-04a
Capital Assets	FE of disposal + 5 years	GR1025-05a
Cash Receipt Books	FE of receipt + 5 years	GR1025-27a
Census Records	Permanent	TX4000-01
Check Register	FE + 5 years	GR1025-28
Construction Project Files	Life of asset + 10 years	GR1075-16a
Contracts, Architects & Engineers	4 years after expiration/termination; project records: life of asset + 10 years	GR1000-25 / GR1075-16a
Contracts, Construction	Life of asset + 10 years	GR1075-16a
Contracts, Facilities Use	4 years after expiration/termination	GR1000-25
Contracts, Installation	4 years after expiration/termination; if part of construction project, life of asset + 10 years	GR1000-25 / GR1075-16a

Contracts, Maintenance & Service	4 years after expiration/termination	GR1000-25
Contracts, Other	4 years after expiration/termination	GR1000-25
Deeds	Permanent	GR1000-27
Deposit Slips, Deposit Documents & Records	FE + 5 years	GR1025-28
Easements	Permanent	GR1000-28
Financial Reports-Periodic	FE + 3 years	GR1025-07a
Financial Disclosure Statements	Date of separation + 2 years	GR1050-33
Fixed Asset Records	FE of disposal + 5 years	GR1025-05a
General Journal Entries	FE + 5 years	GR1025-30d
General Ledger	FE + 5 years if annual audit exists; otherwise Permanent	GR1025-30a
Grant Applications	FE + 5 years for successful grants; 3 years for successful-grant development working papers	GR1025-08a/c
Insurance Policies	4 years after expiration/termination	GR1000-29
Internal Audit Work Papers	3 years after all audit questions are resolved	GR1025-01e
Inventory Reports	US + 3 years for capital asset inventories; 1 year for parts/supplies inventories	GR1025-05c / GR1075-02
Investment/Cash Pledged Securities Records	FE + 5 years for investment transactions; 4 years after release of pledged-security obligations	GR1025-09a / GR1025-02
Investment Records/Reports	FE + 5 years	GR1025-09a
Journals, All	FE + 5 years	GR1025-30c
Paid Bills, Invoices & Exp Statement	FE of final payment + 5 years	GR1025-26a
Purchase Orders (Payment Copy)	FE + 5 years	GR1075-03a
Purchase Orders & Requisitions	FE + 5 years	GR1075-03a
Returned Checks	FE of receipt + 5 years	GR1025-27a
Sales Tax Reports	4 years after tax due date or date tax paid, whichever is later	GR1050-53b
School Bus Purchase Requisitions	FE + 5 years	GR1075-03a
Student Accounting Cards	FE + 5 years	GR1025-30 / SD financial records
Student Activity Accounting Records	FE + 5 years	GR1025-30 / SD financial records
Warehouse Reports/Transactions	1 year for inventory reports; FE + 5 years when documenting financial transactions	GR1075-02 / GR1025

Board, Administration, Records Management & Legal Records

Record Type	Retention Period	Schedule / Series
Board Minutes of Meetings	Permanent	GR1000-03
Board Resolutions & Dedications	Permanent	GR1000-05 / GR1000-06
Board (most other items)	2 years	GR1000-02 / related
Election Results and Minutes	Permanent	EL3100 series
Election Materials	22 months after election unless a longer series applies	Local Schedule EL
Legal Opinions	Permanent	GR1000-30
Open Record Requests	1 year after fulfilled/withdrawn; 2 years after exemption notice if exempt	GR1000-34a/b
Policies & Administrative Regulations	US, expired, or discontinued + 5 years	GR1000-38
Principals' and Superintendents' Reports	5 years for periodic administrative reports; Permanent for annual reports of enduring value	GR1000-41 / SD3275-02a
Procedure Documentation	US, expired, or discontinued + 5 years	GR1000-38
Records Management Records Control Schedule	Permanent	GR1000-40a
Reports (annual) to State Agencies	Permanent when annual/cumulative report; otherwise applicable program series	GR1000-41a / SD
School Board Agenda	2 years	GR1000-02a
School Board Meetings Minutes	Permanent	GR1000-03
Telephone Logs and Activity Records	FE + 5 years if used for cost allocation; otherwise 1 year	GR1075-41a/b

Email & General Administrative Records

Record Type	Retention Period	Schedule / Series
E-mail: If important, print out and keep as required	Retain for the same period as the record content; printing is not required	Applicable GR/SD/TX series
Policy & Program Development	US, expired, or discontinued + 5 years	GR1000-38
Administrative	2 years	GR1000-41 / district administrative correspondence
Routine	AV	GR1000-50

Personnel & Payroll Records

Record Type	Retention Period	Schedule / Series
Certificates, Licenses, or Permits	US or date of separation + 5 years	GR1050-04
Criminal History Checks	Destroy 1 year after received or date used for authorized purpose, whichever is sooner	SD3575-11

EEOC Records, Reports, and Case Files	Final disposition + 3 years	GR1050-16
Employee Absence from Duty Reports	FE + 5 years	GR1050-54b/c
Employee Drivers Records	US or date of separation + 2 years	SD3500-03c
Employee Ethnicity and Race Data Collection Records	3 years or until litigation/claim/audit is complete, whichever is later	SD3200-10
Employee Exit Interviews	Date of separation + 2 years	GR1050-35
Employee Fingerprint Records	Date of separation + 5 years	GR1050-19
Employee Grievance Records	Final decision + 2 years	GR1050-20
Employee Insurance Records	Date of separation + 5 years for life/health/disability enrollment records	GR1050-08b
Employee IRS Forms W-2, W-4, 1094, and 1095	4 years after tax due date/date paid for W-2/1094/1095; W-4: 4 years after separation or amendment, whichever sooner	GR1050-53a/b
Employee Job Evaluations	Date of separation + 5 years	GR1050-21
Employee Leave Status Cards	FE + 5 years; final accumulated sick-leave record: date of separation + 75 years	GR1050-54a/c
Employees' Permanent Files	Date of separation + 75 years for required employee service information	GR1050-12
Employee/Personnel Roster	3 years	GR1050-27
Employee/Personnel Studies & Surveys	3 years	GR1050-25
Employee Selection Records	2 years from creation/receipt or personnel action, whichever is later	GR1050-11
Employee Service Records	Date of separation + 75 years	GR1050-12
Employee Teacher Performance Appraisal Records	Permanent	SD3575-05a
Employee Teacher Performance Appraisal Growth Plans	4 years	SD3575-05e
Employee Teacher Certificate Registers	Permanent	SD3575-09
Employment Ads or Announcements	2 years	GR1050-13
Employment Applications	2 years from creation/receipt or personnel action, whichever is later	GR1050-14a
Employment Contract	Last effective date + 4 years	GR1050-15a
Payroll Checks	FE + 5 years	GR1025-28 / payroll accounting

Payroll Deduction Authorizations	4 years after separation or 4 years after amendment/expiration/termination, whichever is sooner	GR1050-50
Payroll Registers	FE + 5 years; if used to satisfy pension/deferred compensation requirement, date of separation + 75 years	GR1050-52b/c/d
Payroll Tax Reports	4 years after tax due date or date tax paid, whichever is later	GR1050-53b
Payroll Time Reports	4 years	GR1050-56
Permits and Licenses	US or date of separation + 5 years for employee credentials; nonemployee permits: expiration + 2 years	GR1050-04 / GR1000
Professional Growth Plans	4 years	SD3575-05e
Substitute Teaching Rosters	3 years	SD3575-18
Unemployment Compensation Claim File	After claim closed + 5 years	GR1050-29
Workers' Compensation Claim Files	CE of claim closure + 50 years if self-insured; CE + 5 years if not self-insured	GR1050-32b

Facilities, Safety, Health & Environmental Records

Record Type	Retention Period	Schedule / Series
Accident Reports – Personal Injury	CE + 5 years	GR1050-32a / GR1075-15
Accident Reports – Property Damage	3 years	GR1075-15
Accident Reports	5 years	GR1075-15 / GR1050-32a
Blood Borne Pathogen Training Records	3 years	GR5750-01
Equipment Maintenance Records	Life of equipment	GR1075-18a(2)
Facilities Maintenance & Repair Records	5 years	GR1075-18b(2)
Fire Drill Records	3 years	SD3525-02
Fire Safety Inspection Reports	5 years	SD3525-03
Hazardous Communication Act Material	30 years for workplace chemical lists; training records 5 years	GR5750-04/06
Hazardous Material Training Records	5 years	GR5750-04
Health Reports of Employees exposed to toxic agents	Date of separation + 30 years	GR1050-22b(1)
Lost & Stolen Property Reports	3 years	GR1075-13
Maintenance Work Orders	2 years; if only record of vehicle/equipment repair, life of asset	GR1075-19
Material Safety Data Sheets	AV after updated sheet is received or chemical is no longer present	GR5750-05

Safety Monitoring Reports concerning toxic sub	30 years	GR1050-22c
Work Place Chemical List	30 years	GR5750-06

Student Academic, Attendance & General Records

Record Type	Retention Period	Schedule / Series
Enrollment Forms and Reports	US or date of withdrawal + 5 years, whichever is sooner	SD3200-04
Grade Book (electronic and official)	1 year after grades are entered in academic/cumulative record	SD3325-02
Grade reports (teachers)	AV	SD3325-03
Grade report cards	1 year after entry in academic/cumulative record	SD3325-05
Lesson Plans	AV	Schedule SD - instructional records
PEIMS reports	5 years	SD3600-01
Student Academic Achievement record 9-12	Permanent	SD3200-01a
Student Accident reports	5 years; if involving minor injury claim, retain until claim requirements are met	GR/SD accident records
Student Attendance records (teacher)	AV	Schedule SD - attendance working records
Student Attendance regarding home visits	2 years	SD3275-01b/c
Student Attendance Records/Reports (official electronic)	5 years	SD3275-02b
Student birth certificate	AV	SD3200-02
Student Cumulative Records K-8	Date of withdrawal + 5 years; records containing 9-12 course credit are Permanent	SD3200-01b
Student Cumulative Records 9-12	Permanent	SD3200-01a
Student Custody records	Until age 18 or date of withdrawal + 2 years, whichever is sooner	SD3200-03
Student Directory Information forms	AV / US, depending on form	SD3225-02d
Student Emergency Cards	US or date of withdrawal, whichever is sooner	SD3300-05
Student Enrollment/registration forms	US or date of withdrawal + 5 years, whichever is sooner	SD3200-04
Student Extracurricular Activity Records	2 years	SD3625-05
Student Handbook Acknowledgement Form	Current student - until superseded	Schedule SD - student administrative records
Student Home Language Surveys	Date of withdrawal + 5 years	SD3200-05
Student Impact Aid Survey forms	5 years if eligible; AV if not eligible	SD3250-43a/b

Student permission slips for field trips	Cessation of activity + 2 years	SD3200-07
Student Test and Academic Measurement Reports	Date of withdrawal + 5 years	SD3200-09b
Student Transfer information	5 years	SD3275-04
Student Withdrawal/Record Transfer Form	AV	SD3200-08
Transfer Records	5 years	SD3275-04 / SD3200-09b

Student Discipline, Counseling & Health Records

Record Type	Retention Period	Schedule / Series
Student Discipline – no expulsion	AV	SD3350-01b
Student Disciplinary & Adverse Action Records for removal of student to DAEP or expulsion	5 years	SD3350-01a
Student Drug/Alcohol test results	1 year for negative tests	SD3625-06a
Student Drug/Alcohol positive tests	Date of withdrawal or 5 years, whichever is sooner	SD3625-06b
Student Exclusion from participation documents	2 years after notarization/activity, or date of withdrawal if earlier; lifelong medical contraindication: date of withdrawal	SD3300-06
Student Guidance and counseling	AV; federally funded special-program counseling: cessation of services + 5 years	SD3350-02
Student Health Communications with parents	2 years	SD3300 / district health correspondence
Student Health Screening/Records	Date of withdrawal + 7 years or until age 21, whichever is later, for cumulative health record	SD3300-04
Student Immunization Records	Date of withdrawal + 2 years	SD3300-08a
Student medication/treatments	3 years	SD3300-11a
Student physician authorizations and parent request	End of validity + 2 years	SD3300-11b
Student reports to law enforcement agencies	2 years for health-related reports	SD3300-10

Special Programs, Nutrition, Transportation, Instructional Materials & Other School Records

Record Type	Retention Period	Schedule / Series
Adult & Vocational Ed Records	End of enrollment + 5 years	SD3375-04
E-Rate records	FE + 10 years	GR1075-42
Health Inspection Reports	End of program year + 5 years for school nutrition inspections	SD3450-05
Health Reports Submitted to TX Dept of Health	3 years for annual immunization status reports; 2 years for vision/hearing/spinal screening reports	SD3300-08b / SD3300-07b

Library Records	AV for circulation/borrower/accession records; US for inventories/catalogs; federally funded ILL records FE + 7 years	SD3650-01 through 06
School Calendar	US + 2 years	SD3625-03
School Nutrition Records	End of program year + 5 years	SD3450-02 through 06
Schools FIRST reports and support	3 years	SD accreditation/financial reporting series
Special Education enrolment lists	5 years	SD3250-01
Special Education student records	Cessation of services + 5 years	SD3250-02
Student Special Program Records	Cessation of services + 5 years	SD3250 special-program series
Textbook Records	Inventories US + 1 year; student distribution/return end of school year or withdrawal + 3 years; campus distribution/return end of school year; destruction reports 2 years; financial records FE + 2 years	SD3475-04 through 06
Transportation Reports to TEA	3 years	SD3500-05
UIL Records	2 years	SD3625-04
Visitor Logs	3 years	SD3625-07

Tax Records

Record Type	Retention Period	Schedule / Series
Tax Correspondence	2 years	TX3000-12
Tax Rate Calculation Worksheets & Notices	3 years	TX3000-15
Tax Refund Applications	FE + 3 years	TX3000-17
Tax Rolls and amendments	20 years for real property; 10 years for personal property	TX3000-18
Tax Statement	AV; returned undeliverable statements: 1 year after return	TX3000-09

Official TSLAC References

[Local Schedule GR](https://www.tsl.texas.gov/slr/localretention/schedule_gr) - https://www.tsl.texas.gov/slr/localretention/schedule_gr

[Local Schedule SD](https://www.tsl.texas.gov/slr/localretention/schedule_sd) - https://www.tsl.texas.gov/slr/localretention/schedule_sd

[Local Schedule TX](https://www.tsl.texas.gov/slr/localretention/schedule_tx) - https://www.tsl.texas.gov/slr/localretention/schedule_tx

[Local Schedule EL](https://www.tsl.texas.gov/slr/localretention/schedule_el) - https://www.tsl.texas.gov/slr/localretention/schedule_el