



Changes to Local Schedule GR

This document outlines revisions to Local Schedule GR. These revisions became effective September 15, 2015.

Note: The use of an asterisk (*) in the fifth edition of Local Schedule GR indicates that the record is either new to this edition, the retention period for the record has been changed, or amendments have been made to the description of or remarks concerning the record. An asterisk is not used to indicate minor amendments to grammar or punctuation. Only the changes to those records series with an asterisk have been included in the list below.

Summary of Changes

Record Number	Records Series Title	Description of Change
Part 1: Administrative Records		
GR1000-03	Minutes	Revised record title and added retention note for clarification.
GR1000-03c	Minutes	Revised record description to update terminology.
GR1000-03d	Minutes	Revised record description to update terminology.
GR1000-03e	Minutes	Revised record description to update terminology.
GR1000-03f	Minutes	Revised record description to update terminology.
GR1000-05	Ordinances, Orders, and Resolutions	Revised record title and added retention note for clarification.
GR1000-08	Speeches, Papers, and Presentations-Elected Officials	Revised record title and added retention note referencing new record series for other local government staff (GR1000-51).
GR1000-09	Public Comment Forms	New record series.
GR1000-20	Accident Reports	Added retention note to reference related record series.
GR1000-21	Affidavits of Publication	Revised record title and added series description.

GR1000-21a	Affidavits of Publication	Revised retention note. Exempt from the destruction notice requirement no longer applies.
GR1000-21b(1)	Affidavits of Publication	Revised retention period to reflect updated Election Code. Retention period changed due to HB2814 (81st Legislature).
GR1000-21b(2)	Affidavits of Publication	Revised retention period to reflect updated Election Code. Retention period changed due to HB2814 (81st Legislature).
GR1000-23	Charters	Added record description for clarification.
GR1000-24	Complaints	Revised record description and added retention note to reference related record series.
GR1000-25	Contracts, Leases, and Agreements	Revised record description to include certificates of liability and retention note added.
GR1000-26b	Correspondence, Internal Memoranda, and Subject Files - General	Added retention note.
GR1000-27	Deeds	Revised record series title and added record description.
GR1000-29	Insurance Policies	Revised retention period.
GR1000-31	Litigation Case Files	Revised record series title and added retention note for clarification.
GR1000-32	Minutes (Staff)	Added retention note to reference related record series.
GR1000-34a	Public Information Act Requests	Removed legal citation; retention period is not set by this law. Public Information Act is appropriately referenced in description for main series, GR1000-34. Revised description and retention period to include withdrawn requests.
GR1000-34b	Public Information Act Requests	Removed legal citation; retention period is not set by this law. Public Information Act is appropriately referenced in description for main series, GR1000-34.
GR1000-35	Organizational Charts	Added a retention note recommending review before disposal.
GR1000-36	Permits and Licenses	Revised record description to include certificates of liability.
GR1000-40b	Records Management Records	Revised record description for clarification. Disposition is the correct term and refers to destruction or transfer of custody.

GR1000-40d	Records Management Records	Revised record description. Disaster recovery plans should be a separate record series and should cover all functions of local government operations, not just records management. Disaster preparedness plans are now covered by a new record series, GR5750-07.
GR1000-40e	Records Management Records	New record series.
GR1000-41a(5)	Reports and Studies (Non-Fiscal)	Added raw data to Record Description.
GR1000-41a(6)	Reports and Studies (Non-Fiscal)	Added raw data to Record Description.
GR1000-42	Waivers of Liability	Revised record series title and added record description for clarification.
GR1000-50	Transitory Information	Revised record description to include drafts and working papers.
GR1000-51	Speeches, Papers, and Presentations	New record series.
GR1000-52	Subpoenas	New record series.
GR1000-53	Release of Records Documents	New record series.
GR1000-54	Committee Records	New record series.
GR1000-55	Lobbyist Registration Records	New record series.

Part 2: Financial Records

GR1025-01	Fiscal Audit Records	Revised record series title and added record description for clarification.
GR1025-01a	Fiscal Audit Records	Revised record series title.
GR1025-01b	Fiscal Audit Records	Revised record series title.
GR1025-01c	Fiscal Audit Records	Revised record series title.
GR1025-01d	Fiscal Audit Records	Revised record series title.
GR1025-01e	Fiscal Audit Records	Revised record series title.
GR1025-04c	Budgets and Budget Documentation	Increased retention period; retention period matches retention for working papers for permanent reports in GR1000-41.
GR1025-05a	Capital Assets Records	Revised record description for clarification.
GR1025-06	Federal Revenue Sharing Records	Federal revenue sharing was eliminated; obsolete record. Local governments who are still in possession of these types of records need only keep for as long as administratively valuable.
GR1025-26a	Accounts Payable and Disbursement Records	Revised retention period and retention note to reference related record series.

GR1025-26b	Accounts Payable and Disbursement Records	Revised retention period for clarification.
GR1025-26c	Accounts Payable and Disbursement Records	Revised record description and added retention note to reference related record series.
GR1025-27a	Accounts Receivable Records	Revised record description and retention period for clarification.
GR1025-27e	Accounts Receivable Records	Revised retention period for clarification.
GR1025-28	Banking Records	Revised record description for clarification and to include monetary transport records such as armored car pickup logs.

Part 3: Personnel and Payroll Records

GR1050-02c	Aptitude and Skills Test Records	Revised record description and retention period for clarification.
GR1050-03	Awards and Commendations	Added record description and retention notes for clarification.
GR1050-06a	Counseling Program Records	Revised record description and added retention note for clarification.
GR1050-07	Disciplinary and Adverse Action Records	Added retention note for clarification.
GR1050-07(2)	Disciplinary and Adverse Action Records	Revised record description. Local Government Code, Chapter 143 increased population requirement from 5,000 to 10,000.
GR1050-08a	Employee Pension and Benefits Records	Revised retention period. Federal regulation, 29 CFR 1627.3(b)(2), only requires minimum retention of termination of plan + 1 year.
GR1050-08b	Employee Pension and Benefits Records	Revised record description.
GR1050-08b(2)(C)	Employee Pension and Benefits Records	New sub-series.
GR1050-09	Employee Recognition Records	Added retention note to reference related record series.
GR1050-20	Grievance Records	Revised retention period for clarification.
GR1050-21	Job Evaluations	Revised record title, added record description and retention notes, and revised retention period for clarification.
GR1050-22a	Medical and Exposure Reports	Revised retention period for clarification.
GR1050-23	Oaths of Office	Added record description for clarification.
GR1050-24	Personnel Action or Information Notices	Revised retention period for clarification.

GR1050-27	Reduction in Force Plans	Revised record title and added record description for clarification.
GR1050-30	Verifications of Employment Eligibility (Form I-9)	Revised record title and corrected legal citations.
GR1050-32	Workers Compensation Claim Records	Revised GR1050-32 to expand into two sub-series, GR1050-32a and GR1050-32b(1-2).
GR1050-32a	Workers Compensation Claim Records	GR1050-32a is for initial forms, reports, or logs of accidents or job-related illnesses. Added retention note referencing GR1050-32b for incidents that lead to a claim. Removed note concerning Texas Department of Insurance (TDI). After further research, TDI retains these records for 50 years.
GR1050-32b(1)	Workers Compensation Claim Records	New sub-series for workers compensation claim records for local governments who are self-insured.
GR1050-32b(2)	Workers Compensation Claim Records	New sub-series for workers compensation claim records for local governments who are not self-insured.
GR1050-33	Financial Disclosure Statements	Revised record description, retention period, added legal citation, and added retention note to reference related record series.
GR1050-37	Employee Acknowledgement Forms	Added retention note for clarification to reference related record series.
GR1050-40	Applications for Permanent Employment Certification (ETA Form 9089)	New record series.
GR1050-41	Outside/Secondary Employment Authorizations	New record series.
GR1050-42	License and Driving Record Checks	New record series.
GR1050-43	Labor Statistics Reports	New record series.
GR1050-44	Americans with Disabilities Act (ADA) Documentation	New record series.
GR1050-55a	Payroll Action or Information Notices	Revised retention period for clarification.

Part 4: Support Services Records

GR1075-02	Parts and Supplies Inventory Records	Revised records series title and added record description for clarification.
-----------	--------------------------------------	--

GR1075-16a	Construction Project Records	Revised record description to reference related records series.
GR1075-16b	Construction Project Records	Added retention note (b).
GR1075-16d	Construction Project Records	New record series.
GR1075-19	Service Requests/Work Orders	Revised record series title and added description for clarification.
GR1075-20a	Usage Reports	Revised record series title. Information is included in main series description, GR1075-20.
GR1075-20b	Usage Reports	Revised record series title. Information is included in main series description, GR1075-20.
GR1075-20c	Usage Reports	Revised record series title. Information is included in main series description, GR1075-20.
GR1075-23	Vehicle and Equipment Warranties	Revised record series title and added record description for clarification.
GR1075-26	Equipment Manuals	New record series.
GR1075-41c	Telephone Logs or Activity Reports	Withdrawn. See new record series, GR1075-43.
GR1075-42	E-Rate Records	Revised retention period. Retention period is changing to FE + 10 years according to revised regulation, 47 CFR 54.516 which goes into effect on July 1, 2015.
GR1075-43	Directory Information	New record series. Formerly listed as GR1075-41c.
GR5750-07	Disaster Preparedness and Recovery Plans	New record series.

Part 5: Information Technology Records

GR5800-04	Information System/Database Records	Revised Record Series Title, Description, and retention period for clarification.
GR5800-05	Processing Records	Revised Record Description, Retention Period, and added Retention Note for clarification.
GR5800-06	Software Programs	Removed program listing and source code from description. These records are covered by a new record series, GR5800-09.
GR5800-08	Technical Documentation	Revised record description for clarification.
GR5800-09	Automated Program Listing/Source Code	New record series.

GR5825-01	System Security Records	GR5825-01 separated into two sub-series with revised Record Series Titles, Descriptions, and Retention Periods.
GR5825-01a	System Security Records	New sub-series.
GR5825-01b	System Security Records	New sub-series.
GR5825-05	Data Processing Policies and Procedures	Record series removed; records are covered by GR1000-38 Policy and Procedure Documentation.
GR5825-07	Network Systems Disaster Preparedness and Recovery Plans	Withdrawn. See new record series, GR5750-07 Disaster Preparedness and Recovery Plans.
GR5825-09	Data Entry Documents	Revised record title and record description for clarification.
GR5825-12	Operating System and Hardware Conversion Plans	Revised retention period to cover full reporting cycle.
GR5825-14	Quality Assurance Records	Revised retention period for clarification.
GR5825-16	System Activity Monitoring Records	Revised record description for clarification.
GR5825-17	Electronic Records Training Records	Withdrawn. See GR1050-28, Training and Educational Achievement Records.