



Changes to Local Schedule GR

This document outlines revisions to Local Schedule GR. These revisions became effective September 15, 2015. A revised edition became effective on April 17, 2016. Changes to the revised edition are highlighted in the table below.

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 |
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| 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. |

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| 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. |

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| 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

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| 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. |

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| 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

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| 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. |

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| 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

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| GR1075-02 | Parts and Supplies Inventory Records | Revised records series title and added record description for clarification. |
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| GR1075-04 | W-9 Form –Request for Taxpayer Identification Number (TIN) and Certification | New record series. |
| GR1075-16a | Construction Project Records | Revised record description to reference related records series. Revised retention period to LA+10. Revised retention notes. |
| GR1075-16b | Construction Project Records | Revised retention notes. |
| GR1075-16c | Construction Project Records | Revised record description. |
| 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

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| 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. |

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| 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. |