

March 29, 2022



Jon Heining  
General Counsel  
Texas Legislative Council  
Robert E. Johnson Bldg. #3.117  
Austin, TX 78701

Dear Mr. Heining,

Your agency's records retention schedule is approved for use as of **3/24/2022**, and it may be accessed on our website at <https://www.tsl.texas.gov/slrn/state/schedules>. Please ensure that all old copies of the schedule are superseded with this certified copy.

Lorenzo de Zavala  
State Archives and  
Library Building

1201 Brazos Street  
Austin, Texas  
78701

P.O. Box 12927  
Austin, Texas  
78711-2927

[www.tsl.texas.gov](http://www.tsl.texas.gov)

*Commission Chair*  
Martha Wong

*Members*  
David C. Garza  
F. Lynwood Givens  
David Iglesias  
Arthur T. Mann  
Bradley S. Tegeler  
Darryl Tocker

*Director and Librarian*  
Gloria Meraz

This approved retention schedule provides you with continuing authorization to dispose of agency records according to its terms. Please note that state rules (13 TAC §6.8) require documentation of the final disposition of records by your agency. This requirement may be met by maintaining a disposition log or other evidence of the records series titles, dates covered, volume, and date of disposition. The destruction of any records of your agency not on your schedule requires special authorization from us.

Each agency schedule must be reviewed, updated, and submitted for recertification according to a timeline established by the Texas State Library and Archives Commission. Your next recertification is scheduled for **March 2027**.

During a certification period, changes may need to be made to your schedule. State rules (13 TAC §6.4) also allow for the submission of amendments to the retention schedule as needed to keep the information in the schedule current. If you are not familiar with the amendment process, or if you have any other questions, please contact the Government Information Analyst assigned to your agency:

Brianna Cochran  
(512) 463-5448  
[bcochran@tsl.texas.gov](mailto:bcochran@tsl.texas.gov)

Your efforts in developing a records retention schedule are appreciated. It not only helps to ensure the integrity of your recordkeeping practices, but it is also essential to the success of your records management program.

Sincerely,

A handwritten signature in black ink, appearing to read "G/Kelso".

Craig Kelso  
Director and State Records Administrator

cc: Agency head

**TSLAC**

Preserving yesterday  
Informing today  
Inspiring tomorrow



STATE OF TEXAS

**Records Retention Schedule Certification**

SLR 105C

Form SLR 105 or SLR 122 must accompany all submissions of this form.

**Section 1. Agency Information**

*(Submitting agencies complete this section only)*

Agency Code 103  
Agency Name Texas Legislative Council

*(Check one)*

- Initial Certification - Form SLR 105
- Recertification - Form SLR 105
- Amendment - Form SLR 122

*I hereby certify that this records retention schedule was prepared in accordance with Texas Government Code, Chapter 441, Subchapter L.*

*(Check one)*

- Agency Head
- Records Management Officer

Signature

Name *(Print or type)* Jon Heining

Date 30 November 2021

**Section 2. Approvals**

*(Submitting agencies do not write in this section)*

**State Auditor's Office**  
*(For the exclusive use of the State Auditor's Office)*

Signature

Name *(Print or type)* Not Required at This Time

Date

**Texas State Library and Archives Commission**  
*(For the exclusive use of the State Library and Archives Commission)*

Signature

Name *(Print or type)* Gloria Méraz

Date

3-24-2022

Cert/Recert No.

8

Amendment No. —

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# CAUTION

A state record with an expired retention period may not be destroyed if any litigation, claim, negotiation, audit, public information request, administrative review, or other action involving the record is initiated; its destruction shall not occur until the completion of the action and the resolution of all issues that arise from it.

A state record with a retention period that expires during any litigation, claim, negotiation, audit, public information request, administrative review, or other action involving the record may not be destroyed until the completion of the action and the resolution of all issues that arise from it.

Amendment Note: If this schedule is amended at any point after certification, updated records series will be indicated by an asterisk (\*) preceding the Agency Item Number (AIN).

State and Local Records Management Division  
Texas State Library and Archives Commission  
(Rev. 7/20)





STATE OF TEXAS  
Records Retention Schedule

SLR 105  
Rev. 2021-07

Retention Codes (field 7)

AC – See field 9 for specific records series definition  
AV – Administratively valuable  
CE – Calendar year end

FE – Fiscal year end  
LA – Life of Asset  
PM – Permanent  
US – Until Superseded

Archival Codes (Field 10)

A/I – Transfer to State/University Archivist  
R/O – Review by State/University Archivist  
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1. Agency Code: 103

2. Agency Name: Texas Legislative Council

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					Years	Months	Days				
<b>Agency-Wide</b>											
AW.01	1.1.007	Correspondence--Administrative	Incoming/outgoing and internal leadership, supervisory, managerial, executive, administrative, substantive, and other high-level correspondence in any media, including electronic communication, pertaining to the formulation, planning, implementation, interpretation, modification, or redefinition of the council's programs, services, or projects and the administrative regulations, policies, and procedures that govern them.		4				R	ARCHIVES NOTE: Only the administrative correspondence of executive staff, board or commission members, division directors, and program heads require archival review. Contact the State Archives when these records have met their retention periods. CAUTION: This records series and AW.02 should be used only for correspondence that is not included in or directly related to another records series in this schedule. For example, a letter concerning an audit for that prescribed by A.01, etc.	
AW.02	1.1.008	Correspondence--General	Non-administrative incoming/outgoing and internal correspondence, in any media, including electronic communication, pertaining to or arising from the routine operations of the policies, programs, services, or projects of the council.		2					See comment to AW.01.	



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AW.03	1.1.013	Calendars, Appointment, and Itinerary Records	Calendars, appointment books or programs and scheduling, or itinerary records maintained by council employees during business hours that document appointments, itineraries, and other activities of council officials or employees.	CE	1				R	ARCHIVES NOTE: Only the calendars, appointment, and itinerary records of executive staff and division directors require archival review. Contact the State Archives when these records have met their retention periods. CAUTION: A record of this type purchased with personal funds, but used by a state official or employee to document his or her work activities may be a state record and subject to this retention period. See ORD-635.	
AW.04	1.1.024	Division Level Strategic Plans and Analyses	Plans and records relating to the process of planning new or redefined council programs, services, or projects that are not included in or directly related to other records series in this schedule.	AC	3			AC = Decision made to implement or not to implement result of planning process.	R	ARCHIVES NOTE: Data processing planning records are not archival.	
AW.05	1.1.043	Training Materials-- External	Instructional materials and other records developed by the council associated with training its clients, including but not limited to training manuals, course registration, class rosters, sign-in sheets, syllabuses, course outlines, and similar training aids used in external training programs.	AC	1			AC = Close of training session, after training materials superseded, or termination of training program, as applicable.		See AW.06 for internal personnel training materials. CAUTION: Does not include hazardous material training records. See AS.09.	



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AW.06	3.3.030	Internal Training Administration Records	Records documenting the planning, development, implementation, administration, and evaluation of in-house training programs, including but not limited to training manuals, course registration, class rosters, sign-in sheets, syllabuses, course outlines, and similar training aids used in in-house training programs.	AC	2			AC = Close of training session, after training materials superseded, or termination of training program, as applicable.		See AW.05 for external training materials. See HR.13 for individual employee training records. CAUTION: Does not include hazardous material training records. See AS.09.	
AW.07	1.1.057	Transitory Information	Records of temporary usefulness that are not an integral part of a records series in this schedule, that are not regularly filed within the council's recordkeeping system, and that are required only for a limited period of time for the completion of an action by a council employee or in the preparation of an ongoing records series. Transitory records are not essential to the fulfillment of statutory obligations or to the documentation of council functions. Examples can be found on page xii, Texas State Records Retention Schedule (Revised 5th Edition).	AC				AC = Purpose of record has been fulfilled.		CAUTION: Records management officers should use caution in assigning this records series item number to council records to make certain they are not part of another records series listed in this schedule or, for records series unique to the council, are not part of a records series that documents the fulfillment of the council's statutory obligations or the documentation of its functions. The disposal of transitory information need not be documented in records disposition logs (A.08).	
AW.11	1.1.063	Staff Meeting Minutes and Notes	Minutes or notes, and supporting documentation, taken at internal council staff meetings.		1						



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					Years	Months	Days				
AW.12	1.1.065	Reports and Studies (Non-Fiscal)--Raw Data	Information or data collected and compiled for the purpose of producing non-fiscal reports.	AV						See AW.13 for reports produced from raw data. CAUTION: Does not include source documentation used for information or data included in or directly related to another records series in this schedule.	
AW.13	1.1.067	Reports and Studies (Non-Fiscal)	Annual, sub-annual, or special reports or studies on non-fiscal aspects of the council's programs, services, or projects compiled by council employees, by advisory committees, or by consultants under contract with the council that are not noted elsewhere in this schedule. Includes reports distributed either internally or to other entities.		3				R	See AW.12 for raw data used to produce reports. ARCHIVES NOTE: Reports are archival when they deal with significant aspects of the council's programs.	
AW.14	1.1.069	Reports--Activity	Reports compiled by council personnel on a daily or other periodic basis pertaining to workload monitoring, task completion times, number of public contacts, and similar activities.		1						
AW.15	1.2.013	Records Access and Locator Aids	Documentation used to provide and improve access to records. Includes job tracking indexes, maintenance call logs, HEAT call logs, and other finding aids.	AC				AC = When aid is superseded, or no longer needed because associated records have been destroyed.		CAUTION: These records must carry the same retention period and archival code of the records they support. For example, note that contract log entries must be maintained for a period consistent with A.29A and A.29B.	





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AW.17	1.3.002	Publication Development Files	Physical and digital development and design files used to create State Publications, including but not limited to background material, copy (drafts), original artwork, photo negatives, prints, flats, etc. This includes all work performed both inside and outside the council.	AV					R	ARCHIVES NOTE: Successive and substantive drafts of major publications may be archival. "Major" is defined by both the publication's authorship and its impact on Texas and Texans. Original artwork, including photo prints and negatives that have significant value as evidence of council programs as well as the potential for re-use, may be archival.	
AW.18	3.3.020	Work Schedules / Assignments	Work, duty, shift, crew, or case schedules, rosters, or assignments.	AV							
AW.19	5.1.004	Mail and Telecommunications Listings	Any council-wide rosters of mailing addresses, telephone or fax numbers, or email addresses.	US							
AW.20	5.1.014	Office Procedures	Any internally distributed manual, guidelines, or similar records that establish standard office procedures for the council, e.g. council style manuals, telephone protocols, and print shop and photocopy ordering instructions.	US	1						



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					Years	Months	Days				
AW.21	1.1.040	Speeches, Papers, and Presentations	Notes or text of speeches, papers, presentations, or reports delivered in conjunction with council work.	AC	2			AC = End of event, until superseded, or obsolete.	R	ARCHIVES NOTE: Only speeches, papers, and presentations given by or on behalf of executive staff, board or commission members, division directors and program heads require archival review.	
AW.22	1.1.077	Release of Records Documentation	Records that document the release of records or information through any method other than a public information request or subpoena (including employment verification).	AC				AC = Date records released.		See A.03 for records released under the public information law. See E.04 for records produced for a subpoena. See HR.02 for records produced for litigation. CAUTION: Some records releases may require a longer retention period. The general counsel should be consulted to ensure compliance with federal and state law.	
<b>Administration</b>											
A.01	1.1.002	Audits	Audits and reviews performed by or on behalf of the council, including the working papers that support the audit. Also includes audits performed on the council.	AC	7			AC = Publication or release of final audit findings.		The State Auditor's Office (SAO) retains any copies of its audits performed on Texas state agencies.	



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A.03	1.1.020	Public Information Requests--Not Exempted	Includes all correspondence and documentation relating to requests for records that are furnished to the public under the public information law, Chapter 552, Government Code. Also includes withdrawn requests.	AC	1			AC = Date request fulfilled or withdrawn.			
A.04	1.1.021	Public Information Requests--Exempted	Includes all correspondence and documentation relating to requests for records that are excepted under the public information law, Chapter 552, Government Code.	AC	2			AC = Date of notification from Office of the Attorney General that records are excepted.			
A.08	1.2.010	Records Disposition Logs	Logs or similar records listing records disposed of by the council, which might include records series title, dates of records, and date of disposition.		10					CAUTION: Disposition can mean destroyed or transferred.	
A.15	4.1.001	Accounts Payable Information	Claims; invoices; statements; copies of checks and purchase orders; expenditure authorizations; ledgers; encumbrance, purchase, general journal, expenditure, and special vouchers; and similar records that serve to document disbursements, including those documenting claims for and reimbursement to employees for travel and other expenses.	FE	3						



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A.19	4.5.002	Fiscal Management Reports	Internal and external periodic fiscal management reports and associated worksheets, including federal financial reports, salary reports, HUB reports, investment performance reports, etc.	FE	5						
A.22	4.9.001	Annual Operating Budgets	Includes encumbrances and documentation about budget transfers and revisions, as well as detail charts of accounts.	FE	3						
A.24	4.7.001	Accounting Policies and Procedures Manuals	Records documenting the internal and external procedural requirements with respect to the council's accounting function.	US	3						
A.25	4.8.001	Banking Records	Bank statements, credit card statements, cancelled checks, check registers, deposit slips, debit and credit notices, reconciliations, and other banking related records.	FE	3						
A.26	4.7.004	Capital Asset Records	Documentation relating to the council's capital and fixed assets, including equipment or property history cards containing data on initial cost, depreciation schedules or summaries used for capital outlay budgeting, and property sale, auction, or disposal records of council-owned equipment and property.	LA	3						



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A.29A	5.1.001 a	Contracts Administration Files--9/1/2015 and After	Contracts, leases, and agreements include general obligation, land lease, utilities, and construction except for buildings. Documents include specifications, affidavits of publication of calls for bids, performance bonds, contracts, purchase orders, inspection reports, and correspondence. May also include other applicable documentation in the master contract file per Texas Comptroller of Public Accounts Contract Management Guide. Executed, renewed, or amended on or after September 1, 2015.	AC	7			AC = Expiration or termination of the instrument according to its terms.		See A.37A, A.37B, and A.37C for bid documentation. See AW.15 for contract logs, although contract log entries for A.29A records must conform to the minimum retention period for this record series.	Section 441.1855, Government Code



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					Years	Months	Days				
A.29B	5.1.001b	Contract Administration Files – 8/31/2015 and Prior	Contracts, leases, and agreements include general obligation, land lease, utilities, and construction except for buildings. Documents include specifications, affidavits of publication of calls for bids, performance bonds, contracts, purchase orders, inspection reports, and correspondence. May also include other applicable documentation in the master contract file per Texas Comptroller of Public Accounts Contract Management Guide. Executed, renewed, or amended on or before August 31, 2015.	AC	4			AC = Expiration or termination of the instrument according to its terms.		See A.37A, A.37B, and A.37C for bid documentation. See AW.15 for contract logs, although contract log entries for A.29B records must conform to the minimum retention period for this record series.	Section 441.1855, Government Code
A.30	5.1.005	Postage Records	Records and reports of postage expenses, including postal meter usage.	FE	3						
A.35	5.2.016	Inventory System Update Listings	Listing shows all additions, changes, deletions, and transfer times for the monthly processing period.	AC				AC = Transfer of information into annual listing.		See A.42 for annual inventory listing.	
A.36	5.2.026	Facilities Reservation Logs	Reservation logs or similar records relating to the use of council facilities such as meeting rooms, auditoriums, convention centers, etc.		2						



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A.37A	5.3.007a	Bid Documentation--9/1/2015 and After	Includes bid requisition/authorizations, invitations to bid or propose, bid specifications, awarded and unawarded bids, and bid tabulation /evaluations. Associated with a contract executed, renewed, or amended on or after September 1, 2015.	AC	7			AC = Expiration or termination of the instrument according to its terms or decision not to proceed with the bid.		See A.15, A.29A, A.29B, A.37B, and A.37C.	Section 441.1855, Government Code
A.37B	5.3.007b	Bid Documentation--8/31/2015 and Prior	Includes bid requisition/authorizations, invitations to bid or propose, bid specifications, awarded and unawarded bids, and bid tabulation /evaluations. Associated with a contract executed, renewed, or amended on or before August 31, 2015.	FE	3					See A.15, A.29A, A.29B, A.37A, and A.37C.	Section 441.1855, Government Code
A.37C	5.3.007c	Bid Documentation--Invalid Bids	Invalid bids that do not meet council submission requirements and are not included in bid evaluation process (e.g. withdrawn, missed submission deadline, incomplete submission, etc.)	AC	2			AC = Date of notification of denial or date of withdrawal, as applicable.		See A.15, A.29A, A.29B, A.37A, and A.37C.	Section 441.1855, Government Code
A.38	5.3.009	Requests for Information	Requests for information preliminary to the procurement of goods or services by direct purchase or bid.	AC				AC = Decision not to proceed with the procurement.		See A.03 and A.04 for public information requests. CAUTION: If the request for information leads to request for proposal or bid, see A.37A, A.37B, and A.37C.	



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A.39	5.6.007	Vehicle Titles and Registration	Vehicle titles, registration information, and owner manuals for state vehicles.	LA							
A.40	4.1.009	Accounts Receivable Information	Bill copies or stubs, statements, billing registers, account cards, deposit warrants, cash receipts, credit card receipts, receipts books, cash transfers, daily cash reports, reconciliations, general journal vouchers, special vouchers, and similar records that serve to document money owed to or received by the council and its collection or receipt.	FE	3						
A.41	5.1.012	Charge Schedules/Price Lists	Schedules of prices charged by the council for services to the public or other agencies, including any documentation used to determine the charges.	US	3						
A.42	5.2.006	Inventory and Property Control Records	Records documenting the inventorying, maintenance, usage, and disposal of council supplies, equipment, and property. Includes lost, stolen, and damage reports.	FE	3						
<b>Assurance Services</b>											
AS.04	5.2.010	Equipment Manuals		LA							
AS.06	5.2.027	Space Utilization Reports	Reports summarizing efficiency of facility space utilization, which may include data on room usage, demand, allocation, and capacity.	AV							





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					Years	Months	Days				
AS.07	5.4.002	Evacuation Plans	Plans for evacuation of council spaces in cases of emergency.	US							
AS.08	5.4.003	Inspection Records	Fire, safety, and other inspection records of council spaces and equipment, including orders issued by inspectors to correct deficiencies in compliance with any code or regulations.	AC	3			AC = Inspection, or date of the correction of the deficiency if the inspection report reveals a deficiency.			
AS.09	5.4.007	Hazardous Materials Training Records	Records of training given to council employees in a hazard communications program. May include but is not limited to date of class, roster of attendees, subjects covered, and instructors.		5					See HR.13 for individual employee training records.	Section 502.009(g), Health and Safety Code
AS.10	5.4.008	Hazard Communication Plans	Plan that provides information to employees about the hazardous chemicals to which they may be exposed to in their workplace.	US	5						Section 502.009(g), Health and Safety Code
AS.11	5.4.013	Continuity of Operations Plans (COOP)	Plans developed to mitigate the damage of potential events that could endanger the council's ability to function. Includes disaster preparedness, response, and recovery plans.	US							Section 412.054, Labor Code
AS.12	5.6.003	Inspection, Repair, and Maintenance Records-- Vehicles	Records and documentation related to inspections, repairs, and maintenance for state vehicles.	LA	1						
AS.13	5.6.005	Vehicle Use Reports	Includes mileage, fuel/oil consumption, passengers carried and other related operational information.	FE	3						



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<b>Executive</b>											
E.04	1.1.076	Subpoenas	Subpoenas for production of evidence produced for litigation in which the council is not a party. Includes legal documents requiring recipient to appear in court to testify, or to produce records to be used in litigation.	AC				AC = Date request fulfilled.		For subpoenas related to litigation in which the council is a party, see HR.02.	
<b>Human Resources</b>											
HR.01	1.1.023	Organization Charts	Charts or diagrams that show the council's structure and the relationships and relative ranks of its departments and job positions.	US					A	ARCHIVES NOTE: Only charts showing the overall arrangement and administrative structure of the council need to be transferred to the Archives and Information Services Division, Texas State Library and Archives Commission. Organizational charts showing division/department level detail are not considered archival.	



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HR.02	1.1.048	Litigation Files	Records created by or on behalf of the council in anticipation of or in the adjudication of a lawsuit.	AC	1			AC = As applicable, the council's decision not to file a lawsuit or decision that a lawsuit will not be filed against it on a matter; dismissal of a lawsuit for want of prosecution or on motion of the plaintiff; or final decision of a court (or of a court on appeal, if applicable) in a lawsuit.	R	ARCHIVES NOTE: Cases that set legal precedent or exhibit historical value will be evaluated by the Archives and Information Services Division of the Texas State Library and Archives Commission for archival preservation. See page ix, Texas State Records Retention Schedule (Revised 5th Edition), for more information.	
HR.03	1.1.056	Americans with Disabilities Act (ADA) Documentation	Self-evaluations and plans documenting compliance with the requirements of the ADA.		3					CAUTION: Does not include ADA Accommodation Requests. See HR.04 and HR.05.	28 CFR 35.105(c)
HR.04	3.1.001	Applications for Employment--Not Hired	Applications, resumes, transcripts, letters of reference, and similar documents whose submission by candidates for vacant positions is required on the application form, by application procedures, or in the employment advertisement.	AC	2			AC = Date of the making of the record or the personnel action involved, whichever occurs later.		Includes RSIN 3.1.042 (ADA Accommodation Requests).	29 CFR 1602.31
HR.05	3.1.002	Applications for Employment--Hired	Applications, resumes, transcripts, letters of reference, and similar documents whose submission by candidates for vacant positions is required on the application form, by application procedures, or in the employment advertisement.	AC	5			AC = Termination of employment.		Includes RSIN 3.1.042 (ADA Accommodation Requests).	



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HR.06	3.1.011	Employee Benefits	Copies of information relating to the selection by employees of life, disability, health, vision, dental, disability, and other types of insurance or benefits offered by the State of Texas to its employees.	AC				AC = Until superseded or termination of employment.		CAUTION: Documents that serve as payroll deduction authorizations must be maintained for the retention period prescribed for HR.18.	
HR.07	3.1.014	Employment Selection Records	Includes notes of interviews with candidates; questions asked of applicants; audio and videotapes of job interviews; driving record and previous injury checks; preemployment physical examinations; polygraph examination results; and all other records that document the selection process.	AC	2			AC = Date of the making of the record or the personnel action involved, whichever occurs later.			29 CFR 1602.31
HR.08	3.1.018	Grievance Records	Records relating to the review of employee grievances or complaints against personnel policies, working conditions, etc.	AC	2			AC = Final decision on the grievance.		CAUTION: Does not include formal complaints filed by a council employee with the Equal Employment Office (EEO) of the US Department of Labor. See HR.02.	
HR.09	3.1.019	Performance Appraisals	Job evaluations, performance appraisals, or other similar documents used to evaluate the performance of an employee.		2						29 CFR 1620.32(c)



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HR.10	3.1.021	Personnel Disciplinary Action Documentation	Disciplinary actions are those actions which may affect pay, status, or tenure. They are imposed to discipline an employee whose conduct is harmful to the best interests of the state, the council, or the employee work force; and for failure to improve performance or conduct following imposition of corrective action. May include cause for demotion, suspension, or dismissal, and the reasons for failure to give written notice of resignation. May also be used to document evidence of employee self-improvement efforts, as well as favorable and unfavorable communication.	AC	5			AC = Termination of employment.			
HR.11	3.1.022	Personnel Information or Action Forms	Forms or similar records used to create or change information concerning the records of an employee, including pay grade, position classification, employee number, evaluation date, and termination of employment.		2						29 CFR 1602.31
HR.12	3.1.023	Position/Job Descriptions	Job descriptions, including all associated task or skill statements, for council positions.	AC	4			AC = Until superseded or job eliminated.			40 TAC 815.106(i)



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HR.13	3.1.027	Training and Educational Achievement Records (Individual)	Certificates of completion, certifications, licenses, transcripts, test scores, or similar records documenting the training, testing, certification, licensing, or continuing education achievements of an employee.	AC	5			AC = Termination of employment.			
HR.14	3.1.029	Employment Eligibility Documentation	Federal reporting form (Form I-9).	AC				AC = 3 years after date of hire or 1 year after termination of employment, whichever is later.			8 CFR 274a.2(b)(2)(i)(A) and (c)(2)
HR.16	3.1.037	Employee Recognition Records	Awards, incentives, tenure, etc.	AC	5			AC = Termination of employment.			
HR.17	3.1.038	Public Access Option Records	Form completed and signed by employee or official, or former employee or official, electing to keep home address, home telephone number, social security number, and family information open or confidential under Section 552.024, Government Code.	US						CAUTION: Most recent public access election information must be kept as long as the former employee verification records. See HR.27.	
HR.18	3.2.001	Employee Deduction Authorizations	Documentation used to start, modify, or stop all voluntary or required deductions from payroll, including garnishment or other court-ordered attachments.	AC	4			AC = After termination of employee or after amendment, expiration, or termination of authorization, whichever is sooner.			
HR.20	3.2.005	W-4 Forms	Employer's copy of "Employee's Withholding Exemption Certificate."	AC	4			AC = Until superseded, obsolete, or upon separation of employee.			26 CFR 31.6001-1(e)(2)



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HR.21	3.2.007	Unemployment Compensation Records	Records and documentation relating to unemployment compensation claims, including reimbursement of funds disbursed by Texas Workforce Commission (TWC).	AC	5			AC = Resolution of the claim.			
HR.22	3.2.008	Direct Deposit Application/ Authorizations	Forms used to deposit employee's earnings into a specified personal account.	AC				AC = Until superseded, cancelled, or last payment deposited after termination of employment, whichever applicable.			
HR.23	3.2.009	State Deferred Compensation Records	Records documenting the amount of pension or deferred compensation earned by individual employees.		4						
HR.27	3.3.011	Former Employee Verification Records	Minimum information needed to verify employment. Includes: name; social security number; exact dates of employment; last known address; and most recent public access authorization.	AC	75			AC = Termination of employment.		See HR.17.	
HR.30	3.3.024	Personnel Policies and Procedures	Any internally distributed manuals, guidelines, or similar records that define council-wide policies and procedures regarding council employees.	US	3					Employee manual; includes working files.	
HR.31	3.3.031	Equal Employment Opportunity (EEO) Reports and Supporting Documentation	Includes documentation used to complete EEO reports.		3						29 CFR 1602.32, 1602.39, 1602.41, 1602.48, and 1602.50



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HR.32	3.4.006	Time and Attendance Records	Records documenting individual employee's hours worked, including work schedules and documentation evidencing adherence to or deviation from normal hours for those employees working on fixed schedules.		4						40 TAC 815.106(i)
HR.33	3.4.008	Sick Leave Pool Documentation	Records documenting number of hours transferred in and out of comprehensive sick leave pool.	FE	3						
HR.34	5.4.001	Occupational Accident Reports and Associated Documentation	Accident or occupational disease reports (by supervisors and employees) and other associated reports required to be submitted to the State Office of Risk Management (SORM) or its predecessors or maintained internally on accident frequency.	CE	5						29 CFR 1904.33; 28 TAC 120.1(c)
HR.35	5.4.011	Visitor Control Registers	Logs, registers, or similar records documenting visitors to limited access or restricted areas of council facilities.		3						
HR.36	5.4.012	Security Access Records	Records relating to the issuance of keys, identification cards, building passes, passwords, signed statements or similar instruments of access to council spaces or other state facilities, equipment, or automated systems.	AC	2			AC = Until superseded, date of expiration, or date of termination, whichever is sooner.			





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HR.37	5.6.004	License and Driving Record Checks		AC				AC = Until superseded or until termination of employment.			
HR.38	5.6.009	Parking Permits or Assignments	Records documenting issuance of parking permits and assignments.	US							
HR.39	3.1.041	Employee Acknowledgment and Agreement Forms	Agreements between an employee and the council authorizing certain actions, including acknowledgement forms, telecommuting agreements, outside/secondary employment authorizations, or other documentation that show proof of receipt and awareness of and adherence to council policies and procedures.	AC	2			AC = Until superseded, obsolete, or date of separation, as applicable.			
HR.40	3.3.033	Recruitment Plans	Diversity and recruitment plans and related workforce analyses.		3						Sections 21.501 and 21.502, Labor Code
HR.41	3.1.013 a	Employment Contracts--9/1/2015 and After	Includes a contract or agreement regarding the terms and conditions of employment of an individual and a contract with a vendor for temporary staffing services. Executed, renewed, or amended on or after September 1, 2015.	AC	7			AC = Expiration or termination of the contract according to its terms.			Section 441.1855, Government Code



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HR.42	3.1.013 b	Employment Contracts-- 8/31/2015 and Prior	Includes a contract or agreement regarding the terms and conditions of employment of an individual and a contract with a vendor for temporary staffing services. Executed, renewed, or amended on or before August 31, 2015.	AC	4			AC = Expiration or termination of the contract according to its terms.			Section 441.1855, Government Code

**Information Systems**

1.01	1.1.057	Project Files	Documentation of standard services provided to clients, including device maintenance, device replacement, trouble calls, and assistance with questions on how to use council software.	AC				AC = Completion of project.		CAUTION: Records management officers should use caution in assigning this records series item number to council records to make certain they are not part of another records series listed in this schedule or, for records series unique to the council, are not part of a records series that documents the fulfillment of the council's statutory obligations or the documentation of its functions. The disposal of transitory information need not be documented in records disposition logs (A.08).	
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I.02	2.1.002	Master Files and Application Data	Relatively long-lived computer files containing organized and consistent sets of complete and accurate electronic records and associated processing files. Examples include, but are not limited to, data tables of relational databases used by applications or computer programs.	AC				AC = Until electronic records are transferred to and made usable in a new system environment, or there are no electronic records being retained to meet an approved retention period established in this schedule that require the use of the system.		CAUTION: Records management officers must be certain before assigning the retention period of AC to master files and application data that the files do not fall under records series listed elsewhere.	
I.03	2.1.007	Computer Software Programs	Council-developed automated software applications, operating system files, and associated processing files, including job control language, programs, applications, scripts, source code, etc.	AC				AC = Until electronic records are transferred to and made usable in a new software environment or there are no electronic records being retained to meet an approved retention period that require the software to be retrieved and read.		CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.	13 TAC 6.94
I.04	2.1.008	Computer Hardware Documentation	Records documenting operational and maintenance requirements of computer hardware such as operating manuals, hardware/operating system requirements, hardware configurations, equipment control systems, and associated processing files.	AC				AC = Until electronic records are transferred to and made usable in a new hardware environment or there are no electronic records being retained to meet an approved retention period that require the hardware to be retrieved and read.		CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.	13 TAC 6.94



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I.05	2.1.009	Hardware and Software Technical Documentation	Records adequate to specify all technical characteristics necessary for reading or processing electronic records; to document modifications to computer programs; to access, retrieve, manipulate, and interpret data in an automated system; and allow for their timely, authorized disposition. Records include but are not limited to: user guides, system or sub-system definitions, system specifications, input and output specifications, system flow charts, program flow charts, program maintenance logs, change notices, data element dictionaries, file layouts, code books or tables, and other records that explain the meaning, purpose, structure, logical relationships, and origin of the data elements.	AC				AC = Until electronic records are transferred to and made usable in a new hardware or software environment with new documentation or there are no electronic records being retained to meet an approved retention period that require the documentation to be retrieved and read.		CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.	13 TAC 6.94
I.07	2.2.016	Software Registrations, Warranties, and License Agreements	Records documenting the registration and licensing of a software application to activate the software for legal use by the end users of the council, along with warranties providing that the software will perform in accordance with functional specifications.	LA	3						



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I.08	5.4.013	Disaster Preparedness and Recovery Plans	Plans developed to mitigate the damage of potential events that could endanger the legislature's information technology assets. Includes disaster preparedness, response, and recovery plans.	US							Section 412.054, Labor Code
<b>Legal</b>											
L.02	1.1.027	Legislative Drafting Files	Includes delivered legislative drafts, working papers, and related correspondence.	AV							Documents that are introduced into the legislative process are maintained by the House, Senate, and Legislative Reference Library of Texas.
<b>Research</b>											
R.02	1.1.027	Legislative Drafting Files	Includes delivered simple resolutions, policy resolutions, bill analyses, house amendment analyses (HAAs), senate amendment analyses (SAAs), and side-by-side analyses (SXSs).	AV							Documents that are introduced into the legislative process are maintained by the House, Senate, and Legislative Reference Library of Texas.
R.03	1.1.065	Research Reports and Studies--Raw Data and Working Papers	Backup materials used in producing research memoranda, surveys, and maps; includes historical census, election, and GIS data.	AV							See AW.13 for reports produced from raw data. CAUTION: Does not include source documentation used for information or data included in or directly related to another records series in this schedule.