

May 14, 2020



Blake Hawthorne
Clerk of the Court
201 W. 14th St Room 104
Austin, TX 78701

Dear Mr. Blake Hawthorne ,

Your agency's records retention schedule is approved for use as of **5/5/2020**, and 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 Please ensure that all old copies of the schedule are superseded with this certified copy.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

Commission Chair
Martha Wong

Members

David C. Garza
F. Lynwood Givens
Larry G. Holt
Arthur T. Mann
Bradley S. Tegeler
Darryl Tocker

Director and Librarian
Mark Smith

Assistant State 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 annually for the first two years after the initial approval of the schedule and every five years thereafter. The deadline for submission of your schedule for its next recertification is the last working day of **May/2025**

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:

Joslyn Ceasar
512-463-5477
jceasar@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 "CK" or similar initials.

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 201
Agency Name Texas Supreme Court

- (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 Blake A. Hawthorne
Name (Print or type) Blake A. Hawthorne
Date 1/7/2020

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) _____
Date _____

Not Required at This Time

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

Signature Gloria Mera
Name (Print or type) Gloria Mera
Date 5/5/2020

Cert/Recert No. _____ Amendment No. 9

CAUTION

A state record whose retention period has expired 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 whose retention period 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.





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SLR 105
Rev. 2017-07

Retention Codes (field 7)

AC – See field 9 for specific records series definition
 AV – Administratively valuable
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 FE – Fiscal year end
 LA – Life of Asset
 PM – Permanent
 US – Until Superseded

Archival Codes (Field 10)

A/I – Transfer to State/University Archivist
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					Years	Months	Days				
F1	1.1.002	Audits	Audits and reviews performed by or on behalf of an agency, including the working papers that support the audit. Also includes audits performed on the agency.	AC	7			AC =Publication or release of final audit findings.		The State Auditor's Office retains any copies of its audits performed on Texas state agencies.	
F2	1.1.004	Legislative Appropriations Request	Including any supporting documentation created and/or used to justify and support legislative appropriations requests by an agency.	AC	6			AC = September 1 of odd-numbered calendar years.	A	ARCHIVES NOTE: The archival requirement is met by sending the required copies of the requests to the Texas State Publications Depository Program, Texas State Library and Archives Commission. Only copies of supporting documentation submitted to the Legislative Budget Board are archival.	
TEMP002	1.1.006	Complaint Records	Complaints received by an agency from the public concerning the agency and records pertaining to the resolution of the complaint.	AC	2			AC= Final disposition of the complaint.		CAUTION: If a complaint becomes the subject of litigation, it must be included in and is subject to the minimum retention period of item number 1.1.048.	



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A1	1.1.007	Correspondence - Administrative	Incoming/outgoing and internal correspondence pertaining to the formulation, planning, implementation, interpretation, modification, or redefinition of the programs, services, or projects of an agency 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 item number 1.1.008 should be used only for correspondence that is not included in or directly related to another records series on the agency's approved schedule. For example, a memorandum that documents an appropriations request must be retained for the minimum retention period prescribed by item number 1.1.004; a letter concerning an audit for that prescribed by item number 1.1.011.	



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A2	1.1.008	Correspondence - General	Non-administrative incoming/outgoing and internal correspondence, in any media, pertaining to or arising from the routine operations of the policies, programs, services, or projects of an agency.		2					SEE comment to item number 1.1.007.	
A39	1.1.010	Directives	Any document that officially initiates, rescinds, or amends general office procedures.	US	1						



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A40	1.1.013	Calendars, Appointment and Itinerary Records	Calendars, appointment books or programs and scheduling, or itinerary records, purchased with state funds or maintained by staff during business hours that document appointments, itineraries, and other activities of agency officials or employees.	CE	1				R	ARCHIVES NOTE: Only the calendars, appointment, and itinerary records of elected officials, 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: 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 Open Records Decision 635 issued in December 1995 by the Attorney General	



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					Years	Months	Days				
A77	1.1.014	Legal Opinions and Advice	From agency legal counsel or the Attorney General, including any requests eliciting the opinions.	AV					R	CAUTION: Does not include legal opinions or advice rendered on a matter in litigation or with regard to pending litigation. SEE item number 1.1.048.	
A78	1.1.019	Public Relations Records	News, press releases, or any public relations files maintained or issued by an agency. Includes print, electronic, audio, and audiovisual records.		2				R		
A41	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 Public Information Act (Chapter 552, Government Code).	AC	1			AC= Date request filled.			
A42	1.1.021	Public Information Requests - Exempted	Includes all correspondence and documentation relating to requests for records that are exempt under the Public Information Act (Chapter 552, Government Code).	AC	2			AC= Date of notification that records are exempt.			
A8	1.1.023	Organization Charts		US					A		



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A79	1.1.024	Plans and Planning Records	Plans and records relating to the process of planning new or redefined programs, services, or projects of an agency 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.	
A80	1.1.026	Texas Register Submissions	Copies of all proposed, withdrawn, emergency, and adopted rules; open meetings notices; or any other documents required by law to be submitted to the Texas Register.	AC	1			AC = Date of publication in the Texas Register.			
A81	1.1.027	Proposed Legislation	Drafts of proposed legislation and related correspondence.	AV							
A82	1.1.040	Speeches, Papers and Presentations	Notes or text of speeches, papers, or reports delivered in conjunction with agency work.	AC				AC = End of term in office or termination of service in a state position.	R		
A43	1.1.043	Training Materials	Instructional materials developed by an agency for training entities or individuals it regulates or serves.	US	1						



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A83	1.1.048	Litigation Files	Records created by or on behalf of an agency in anticipation of or in the adjudication of a lawsuit.	AC	1			AC = As applicable, decision of an agency 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.	
A44	1.1.056	ADA (Americans with Disabilities Act) Documentation	Self evaluations and plans documenting compliance with the requirements of the Americans With Disabilities Act.		3						28 CFR 35.105(c).



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A45	1.1.057	Transitory Information	Records of temporary usefulness that are not an integral part of a records series of an agency, that are not regularly filed within an agency's recordkeeping system, and that are required only for a limited period of time for the completion of an action by an official or employee of the agency or in the preparation of an on-going records series. Transitory records are not essential to the fulfillment of statutory obligations or to the documentation of agency functions. Some examples of transitory information, which can be in any medium (voice mail, fax, email, hard copy, etc.) are routine messages; telephone message notifications; internal meeting notices; routing slips; incoming letters or memoranda of transmittal that add nothing of substance to enclosures; and similar routine information used for communication, but not for the documentation, of a specific agency transaction.	AC				AC = Purpose of record has been fulfilled.		CAUTION: Records management officers should use caution in assigning this records series item number to records of an agency to make certain they are not part of another records series listed in this schedule or, for records series unique to an agency, are not part of a records series that documents the fulfillment of the statutory obligations of the agency or the documentation of its functions. The disposal of transitory information need not be documented through destruction signoffs (1.2.001) or in records disposition logs (1.2.010), but agencies should establish procedures governing disposal of these records as part of its records management plan (1.2.014).	



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A47	1.1064	Agency Performance Measures Documentation	Any records of an agency needed for the documentation of output, outcome, efficiency, and explanatory measures in an agency's appropriations request or strategic plan, and for performance measures used to manage the agency.	FE	3					CAUTION: The FE + 3 retention period overrides any shorter retention period for a records series in this schedule if the records series is needed for documentation of agency performance measures.	
A48	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						CAUTION: Does not include source documentation used for information or data included in or directly related to another records series in this schedule. SEE especially item number 1.1.064.	



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A10	1.1.067	Reports and Studies (Non-Fiscal)	Annual, sub-annual, or special reports or studies on non-fiscal aspects of an agency's programs, services, or projects compiled by agency personnel, by advisory committees, or by consultants under contract with an agency that are not noted elsewhere in this schedule. Includes reports distributed either internally or to other entities. Includes monthly docket status reports created by the Clerk. Retention: 3 years. Vital: No. Archival: R - Review required before disposal.		3				R	ARCHIVES NOTE: For agencies that have had an archival appraisal, separate this records series by each type of archival coding, A, R, or E. SEE explanation of codes for more information.	
A17	1.1.068	Reports on Performance Measures	Quarterly and annual reports on agency performance measures submitted to the executive and legislative offices.	AC	6			AC= September 1 of odd-numbered calendar years.			



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A9	1.1.071	Agency Rules, Policies, and Procedures - Working Files	Manuals, guidelines, administrative rules, or similar records distributed internally for the use of employees or externally to the public or those individuals or entities regulated by an agency that sets out the rules, policies, and procedures that govern an agency's programs, services, or projects.	AC	3			AC= Completion or termination of program, rules, policies, or procedures.	R		
A7	1.1	Minutes of the Court - Administrative Orders		PM							
A14	1.1	Application/Petition Memos		PM					R		
A15	1.1	Rules of Procedure		PM					R		
A16	1.1	Justices' Working Files		AV							
C4	1.1	Minutes of the Court-Cases			50				A	Pre-1944 minute books in State Archives custody.	



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					Years	Months	Days				
C1A	1.1	Case Files, Civil		PM					A	Pre-2005 cases in State Archives custody. If at any time the Court wishes to change the retention to anything other than PM, agency will transfer to State Archives.	Tex. Gov't Code, Section 51.205(b)
C1B	1.1	Case Files, Civil- Multi District Litigation Files		PM					A	Pre-2005 cases in State Archives custody. If at any time the Court wishes to change the retention to anything other than PM, agency will transfer to State Archives.	
C8	1.1	Direct Appeals Returned			20					Court retains permanent record copy 20 years, then to State Archives.	
26	1.1	Exhibits, Civil		AC	3			AC= After final disposition of the case or at an earlier date if ordered by the Court.	R		Tex. Gov't Code, Sec. 51.204(b)(2)



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27	1.1	Opinions		PM					A	CAUTION: Does not include legal opinions or advice rendered on a case in litigation or with regard to pending litigation.	
C56A	1.1	Sealed Records		PM						CAUTION: Does not include Parental Notification Records.	
C56B	1.1	Sealed Records- Parental Notification Records	Cases filed with the Court by minors seeking waivers to the Texas Parental Notification Act.	PM							
C57	1.1	Special Court of Review Records	Records regarding the disciplinary hearings of Texas judges accused of violating the Rules of Judicial Administration.	PM					R	Supreme Court appoints judges for the Special Court of Review, and the Clerk of the Supreme Court acts as clerk for the Special Court of Review.	
C12A	1.1	Administrative Orders		PM					R		
C12B	1.1	Administrative Orders, Expunged	Administrative orders which reference expunged lower court orders.	PM							
C11	1.1	Prisoner Files		AC	30			AC=completion of inquiry		Speedy Trial Motions in storage.	
C2	1.1	Docket Sheets		US						Temporary docket sheets.	



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C3	1.1	Docket Books		PM						Pre-1981 books in State Archives	
C30	1.1	Court of Appeals Transfer		PM					R		
C31	1.1	Annual Reports		PM						Court retains permanent copy; sends copy to State Publications Depository Program	
C9	1.1.	Fee Books		FE	3						Tex. Gov't Code Ann§ 51.207(b), (c), as amended by Tex. S.B. 1534, 75th Leg.: Tex. R. App. P. Appendix.
C32	1.1	Sr. Judges Subject to Assignment		PM							
C27	1.1	History - Justices		PM					R		
C28	1.1	History - Court Staff		PM					R		
C29	1.1	History - Memorials & Resolutions		PM					R		



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C34	1.1.011	State Bar - Canons of Ethics		PM					A		
C35	1.1	State Bar - Committees		PM					A	Appointments.	
C36	1.1	State Bar - Bar Building		PM					A	Reports, Orders, Correspondence.	
C37	1.1.011	State Bar - Dues Referenda		US	3				A	AC= report of referendum and issuance of order	Tex. Gov't Code section 81.024;
C38	1.1	State Bar - Law Students		AC	10			AC= Grant or denial of requests.		Limited Practice, etc.	Gov't Code section 81.102(b).
C39	1.1	State Bar - Resolutions		PM					A	Resolutions from local bar associations memorializing deceased members.	
C40	1.1.011	State Bar - Rules and Recommendations		PM					A		
C41	1.1	State Bar - Court Orders		PM					A		
C46	1.1	Attorney Licensing - Administrative Working File		US							
C47	1.1	Attorney Licensing - Attorney Card Reference File		PM						Card file is over 150 years old.	



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C48	1.1	Attorney Licensing - Licensing Ceremony		AC	1			AC= Ceremony each May and Nov.			
C49	1.1	Attorney Licensing - Record of Disposed Licenses		PM					R		
C52	1.1	Attorney Licensing - Rolls of Attorneys		PM							
C53	1.1	Attorney Licensing - Attorney Name Changes			5						
C58	1.1	Attorney Licensing - Disciplinary Files	Files on attorneys disciplined by the State Bar.	PM							
C59	1.1	Attorney Licensing - Suspended Attorney's Licenses		AC	75				R		
A51	1.1.072	Public Information Reports	Reports made to Office of the Attorney General on an agency's Public Information Act activities.		2						



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A52	1.1.075	Alternative Dispute Resolutions - Final Agreement	Final agreement described by Government Code §2009.054(c), associated with a matter conducted under an alternative dispute resolution procedure in which personnel of a state agency participated as a party on the agency's behalf.	AC	4			AC = Date of final agreement.			Texas Civil Practice and Remedies Code 154.071.
A53	1.2.001	Destruction Authorizations	Agency level documents authorizing final disposition of records under a certified records retention schedule.	FE	3						
A54	1.2.004	Forms Inventory	Any periodic listing of all forms used internally or externally by an agency.	US							
A21	1.2.005	Records Retention Schedule (SLR 105)	Agency copy. Formerly RMD 105. Includes documentation of certification and approval - forms SLR 105C (formerly RMD 105C), and/or other forms designated by the State Records Administrator.	US						Original is retained by the State and Local Records Management Division, Texas State Library and Archives Commission.	



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A23	1.2.006	Records Transmittal Forms	Agency copy (includes RMD 101, Tx-R-5, 306-58-1, and Agency Storage Forms). Forms indicate records transferred to storage or a transfer of legal custody.	AC	2			AC = Date of authorization for destruction, permanent transfer from storage, or transfer to the Archives and Information Services Division, Texas State Library and Archives Commission, by the agency records management officer			
A49	1.2.008	Request for Authority to Dispose of State Records (RMD 102)	Agency copy.	FE	3					Original is retained by the State and Local Records Management Division, Texas State Library and Archives Commission.	
A21	1.2.010	Records Disposition Logs	Logs or similar records listing records destroyed or transferred to the Archives and Information Services Division, Texas State Library, showing records series title, dates of records, and date destroyed or transferred.		10						
A22	1.2.011	Record Center Storage Approval Forms	Agency copy.	US							



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A50	1.2.012	Records Inventory Worksheets		US							
A55	1.2.013	Records Control Locator Aids	Includes indexes, card files, shelf lists, registers, guides, etc.	AC				AC = When control aid is updated, revised, or no longer needed.		CAUTION: These records must carry the same retention period and archival code of the records they support.	
A56	1.2.014	Records Management Plans	Records management plans and similar records that establish the policies and procedures under which records and information are managed in an agency.	US	1						
C55	2.1.007	Software Programs	Automated software applications and operating system files including job control language, program listing/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.			13 TAC 6.94.



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C60	2.1.010	Audit Trail Records	Files needed for electronic data audits such as files or reports showing transactions accepted, rejected, suspended, and/or processed; history files/tapes; records of on-line updates to application files or security logs.	AC				AC = All audit requirements have been met.			
C61	2.2.001	System Monitoring Records	Electronic files or automated logs created to monitor computer systems such as print spool logs, console logs, tape activity logs, etc.	AV							
C62	2.2.016	Software Registrations, Warranties, and License Agreement		LA	3						
A24	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.		2						29 CFR 1602.31 [State Agencies].



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A25	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.			
A73	3.1.006	Employee Counseling Records	Notes, memoranda, or reports relating to the counseling of an employee for work-related, personal, or substance abuse problems. Usually maintained at the supervisory level except in those agencies with counseling staff.	AC	3			AC= Termination of counseling.			
A28	3.1.011	Employee Insurance Records	Agency copies of information relating to the selection by employees of life, disability, health, and other types of insurance 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 item number 3.2.001.	



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A26	3.1.012	Employment Opportunity Announcements	Internal or external announcements or advertisements of job openings, promotions, training programs, or opportunities for overtime.		2						29 CFR 1602.31(a) [State Agencies].
A29	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, pre-employment drug screening test results, polygraph examination results; and all other records that document the selection process.		2					CAUTION: Does not include criminal history checks. SEE item number 3.1.026.	29 CFR 1602.31 [State Agencies].
A84	3.1.018	Grievance Records	Records relating to the review of employee grievances against personnel policies, working conditions, etc.	AC	2			AC = Final decision on the grievance.		CAUTION: Does not include formal complaints filed by an agency employee with the Equal Employment Office (EEO) of the U. S. Department of Labor. SEE item number 1.1.048.	



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A52	3.1.019	Performance Appraisals			2						29 CFR 1620.32(c).
A85	3.1.020	Personnel Corrective Action Documentation	Corrective actions are those actions which do not affect pay, status, or tenure and are imposed to correct or improve an employee's job performance.	AC	5			AC = Termination of employment.		CAUTION: If, during the retention period of this records series, any part of this series is used to document and support personnel disciplinary action under item number 3.1.021, all documentation from this series used to support disciplinary action must be retained for the minimum retention period described by item number 3.1.021.	



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A86	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 agency, 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 employee.			



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A53	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 [State Agencies].
A33	3.1.023	Position/Job Descriptions	Job descriptions, including all associated task or skill statements, for positions in an agency.	AC	4			AC = Until superseded or job eliminated.			40 TAC 815.106(i).
A87	3.1.024	Physical Examinations/Medical Reports	Medical or physical examination reports or certificates of employees for whom periodic monitoring of health or fitness is required.	AC	2					CAUTION: Does not include preemployment physical examinations. SEE item number 3.1.014.	



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A88	3.1.026	Criminal History Checks	Criminal history record information on job applicants or agency employees obtained from the Department of Public Safety (DPS).	AC						CAUTION: Some agencies that are authorized to obtain criminal history record information from DPS are required to destroy the information after it is used for the immediate purpose for which it was obtained. SEE Subchapter F, Chapter 411, Government Code.	
A54	3.1.027	Training and Educational Achievement Records (Individual)	Certificates of completion, transcripts, test scores, or similar records documenting the training, testing, or continuing education achievements of an employee.	AC	5			AC= Termination of employment.			



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A31	3.1.029	Employment Eligibility, Documentation or Verification of	Federal reporting form (INS I-9).	AC	1			AC = Termination of employment.		CAUTION: Federal regulation requires that INS 1-9 forms be retained for 3 years from date of hire or 1 year after separation of the employee, whichever later. Agencies should make certain that the INS I-9 forms for employees who terminate from an agency less than 3 years from date of hire are kept for the 3 year retention period.	8 CFR 274a.2(b)(2)(i)(A) and (c)(2).
A55	3.1.031	Employee Benefits - Other than Insurance	Agency copies of information relating to the selection of available benefit options other than insurance.	AC	2			AC = Until superseded or termination of employment.		CAUTION: Documents that serve as payroll deduction authorizations must be maintained for the retention period prescribed for item number 3.2.001.	
A56	3.1.034	Resumes - Unsolicited	Retention period applies if an agency replies to the sender of a resume that it will be kept on file should future job openings occur.	AV						SEE item number 3.1.014 for resumes, whether solicited or unsolicited, that are used in any way in the employment selection process.	



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A57	3.1.035	Performance Bonds	Bonds posted by employees and individuals or entities under contract with an agency for the performance of the duties of a position or the terms of a contract with the agency.	AC	4			AC = Expiration or termination of the bond according to its terms.		CAUTION: Does not include construction or architectural surety bonds. SEE item number 5.2.028.	
A89	3.1.037	Employee Recognition Records	Awards, incentives, tenure, etc.	AC	5			AC= Termination of employment.			
A90	3.1.038	Public Access Option Form	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 the Public Information Act, Government Code §552.024. .	US						SEE item number 3.3.011	
F5	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 sooner.			



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F6	3.2.002	Employee Earnings Records			4						40 TAC 815.106(i).
F7	3.2.003	Federal Tax Records	Includes 1099, W2, FICA, and other tax records.	AC	4			AC = Tax due date, date the claim is filed, or date tax is paid whichever is later.			
F8	3.2.004	Income Adjustment Authorizations	Used to make increases or decreases to employees' gross pay, FICA, retirement, or in the computation of taxes.		2						29 CFR 516.6(c).
F9	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).
F10	3.2.006	Wage Rate Tables			2						29 CFR 516.6(a)(2).
A30	3.2.007	Unemployment Compensation Records		AC	5						
F34	3.2.008	Direct Deposit Application/Authorization		US							



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F35	3.2.009	State Deferred Compensation Records		AC	5			AC = All accounts with a vendor or vendors for the individual participant have been closed.		For instructions regarding the determination of the closure of accounts and for additional information regarding the retention period see the most current edition of the Benefits Coordinator Reference Manual issued by the Employees Retirement System of Texas.	
A58	3.2.010	Human Resources Information System (HRIS) Reports	Includes supporting documentation.	AC	4						
F11	3.3.004	Benefit Plans	Employee benefit plans such as pension; life, health, and disability insurance; deferred compensation; etc., including amendments.	US	1						29 CFR 1627.3(b)(2).
A27	3.3.010	Labor Statistics Reports	Reports providing statistical information on labor force.		3						



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A32	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 option form.	AC	75			AC = Termination of employment.		SEE item number 3.1.038.	
A59	3.3.015	Positions/Job Classification Review File	Records relating to review and monitoring of job classifications within an agency.	US	3						
A60	3.3.020	Work Schedules/Assignments	Work, duty, shift, crew, or case schedules, rosters, or assignments.		1						
A61	3.3.022	Texas Workforce Commission (TWC) Reports	Reports to the agency from TWC or its predecessor pertaining to employees.		3						
F36	3.3.023	Reimbursable Activities, Requests and Authorizations to Engage in	Requests and authorizations for travel; participation in educational programs, workshops, or college classes; or for other work-related activities for which the expenses of the employee are defrayed or reimbursed.	FE	3						



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A62	3.3.024	Personnel Policies and Procedures	Any internally distributed manuals, guidelines, or similar records that define agency wide policies and procedures concerning the personnel of an agency.	US	3						
A90	3.3.025	Job Procedure Records	Any documents detailing the procedural duties and responsibilities of agency positions on a position-by-position basis.	US	3						
A63	3.3.026	Agency Staffing Reports	Any reports compiled by an agency on aspects of personnel staffing, including listings of all staff by program or name; staff hired during a month; detailed listings of employees within its organizational structure, position vacancies, analyses of turnover rates and seasonality of employment, etc.	US	3						



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A64	3.3.027	Aptitude and Skills Tests	Aptitude or skills tests required of job applicants or of current personnel to qualify for promotion or transfer.	US	2					CAUTION: One copy of each different test (different in terms of either questions or administration procedures) should be retained for the period indicated.	29 CFR 1602.31 [State Agencies].
A65	3.3.028	Aptitude and Skills Tests (Test Papers)	Aptitude and skills test papers of job applicants or of current personnel taking a test to qualify for promotion or transfer		2						29 CFR 1602.31 [State Agencies].
A66	3.3.029	Aptitude and Skills Tests (Validation Records)	Records of the validation of aptitude and skills tests.	AC	2			AC= As long as the test is used by an agency.			29 CFR 1602.31 [State Agencies].
A67	3.3.030	Training Administration Records	Instructional materials and other records associated with in-house training of agency personnel on personnel policies and procedures and other policies and procedures that govern an agency's programs, services, or projects.	US	2					CAUTION: Does not include hazardous material training records. SEE item number 5.4.007.	



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A68	3.3.031	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.
A69	3.4.001	Accumulated Leave Adjustment Requests	Used to create employee leave balances, to transfer leave balances when an employee transfers positions, to adjust carry-over balances on August 31, to correct errors on leave accumulation, and to close out leave accounts on separated employees.	FE	3						
A70	3.4.002	Leave Status Reports	Cumulative report is issued each pay cycle and provides employee leave status information for each position.	FE	3						
A71	3.4.003	Less than Full-Time Worked Reports	Dates and hours.		4						40 TAC 815.106(i).
A74	3.4.004	Overtime Authorizations			2						
A91	3.4.005	Overtime Schedules			2						
A34	3.4.006	Time Cards and Time Sheets			4						40 TAC 815.106(i).



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					Years	Months	Days				
A92	3.4.007	Time Off and/or Sick Leave Requests		FE	3						
A72	3.4.008	Sick Pool Leave Documentation	Requests submitted, approvals, number of hours transferred in and out, etc.	FE	3						
F37	4.1.001	Accounts Payable Information		FE	3						
F38	4.1.002	Billing Detail		FE	3					Does not include long distance telephone billing detail. SEE item numbers 5.5.001, 5.5.006, and 5.5.007.	
F28	4.1.003	Canceled Checks/Stubs/Warrants/Drafts		FE	3						
F39	4.1.004	Encumbrance Detail		FE	3						
F40	4.1.005	Inventory and Other Cost Files	Production, job, labor, quotes, pricing, specifications, etc.	FE	3						
F64	4.1.006	Investment Transaction Files		FE	3						
F41	4.1.007	Transfers or Budget Revisions	Transfers or adjustment to budgets.	FE	3						
F42	4.1.008	Electronic Fund Transfers	Direct deposit registers.	FE	3						



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F15	4.2.001	Cash Deposit Vouchers	Cash deposit slips.	FE	3						
F65	4.2.002	Cash Receipts	Includes receipts for fees (permits, licenses, renewals, etc).	FE	3						
F16	4.2.003	Daily Cash Receipts Logs		FE	3						
F43	4.2.004	Encumbrance Vouchers	Orders, statements, change orders, etc.	FE	3						
F17	4.2.005	Purchase Vouchers	Requisitions, orders, receiving reports, invoices, or statements, change orders, best value determinations, etc.	FE	3						
F44	4.2.006	General Journal Vouchers		FE	3						
F45	4.2.007	Expenditure Vouchers	Travel, payroll, etc.	FE	3						
F68	4.3.001	Sales Journals or Registers		FE	3						
F46	4.3.002	Receipts Journals or Registers		FE	3						
F47	4.3.003	Expenditures Journals or Registers		FE	3						
F19	4.4.001	General and Subsidiary Ledgers		FE	3						



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F20	4.4.002	Accounts Receivable Ledgers		FE	3						
F21	4.4.003	Accounts Payable Ledgers		FE	3						
F48	4.4.004	Employee Savings Bond Ledgers		FE	3						
F22	4.5.001	Worksheets for Preparing Fiscal Reports		FE	3						
F23	4.5.002	Internal Fiscal Management Reports	Includes agency monthly budget reports.	FE	3						



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F24	4.5.003	Annual Financial Reports	Required by the General Appropriations Act (100 Day Report).	AC	6			AC = September 1 of odd-numbered calendar years.		CAUTION: If an agency does not produce a biennial or annual narrative report as described in item number 1.1.066, then these annual financial reports must be marked with Archival Code A. The archival requirement, when a biennial or annual narrative report is not produced, is met by sending the required copies of the reports to the Texas State Publications Depository Program, Texas State Library and Archives Commission.	
F69	4.5.005	External Fiscal Reports	Special purpose- ie federal financial reports, salary reports, etc. Includes HUB reports.	FE	3						
F49	4.5.006	Annual Operating Budgets	Required by the General Appropriations Act.	FE	3						



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F50	4.5.007	USAS Reports- Daily		AC				AC = Receipt and reconciliation of monthly report.			
F51	4.5.008	USAS Reports- Monthly		AC				AC = Receipt and reconciliation of monthly report.			
F52	4.5.009	USAS Reports- Annual		FE	3						
F25A	4.6.001	Balancing Records		FE	3						
F25B	4.6.002	Reconciliations		FE	3						
F25C	4.6.003	Cash Counts		FE	3						
F26	4.7.001	Accounting Policies and Procedures Manual		US	3						
F27	4.7.002	Bank Statements		FE	3						
F53	4.7.003	Returned Checks/Warrants/Drafts (Uncollectable)		AC	3			AC = After deemed uncollectable.			
F54	4.7.004	Capital Asset Records		LA	3						
F55	4.7.005	Claim Files		AC	3			AC= Resolution of claim.			
F56	4.7.006	Comptroller Statements		FE	3						
F63	4.7.007	Detail Chart of Accounts	One for all accounts in use for a fiscal year.	FE	3						



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F58	4.7.008	Federal Grant Records		AC	3			AC = Satisfaction of all Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments (the Common Rule).		CAUTION: Retention requirements may vary depending on the specific federal funding agency. Agencies must ensure that records are retained for the appropriate retention period.	
F59	4.7.009	Fixed Asset Sequential Number Logs		US	3						
F54	4.7.011	Texas Facilities Commission Statements	Charge or bill statements received by agencies from the TFC for services provided.	FE	3						
F62	4.7.012	Signature Authorizations	Signature cards or similar records establishing authority of an agency employee to initiate or authorize financial transactions on behalf of an agency.	AC	3			AC = US + FE			



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F29	5.1.001	Contracts and Leases	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, accepted bids, performance bonds, contracts, purchase orders, inspection reports, and correspondence.	AC	4			AC = Expiration or termination of the instrument according to its terms.		SEE item number 5.2.028 for building construction contracts and item number 5.1.017 for contract logs.	
F60	5.1.004	Mail and Telecommunications Listings	Any mailing address, telephone or fax number, or e-mail address records maintained by an agency on its employees or on entities or persons it serves. US	US							
F30	5.1.005	Postage Records	Records and reports of postage expenses, including postal meter usage.	FE	3						
F32	5.1.007	Requisitions for In-Agency or Inter-Agency Copy/Printing Services	Includes word processing and data processing.	AV							
F56	5.1.011	Photocopier and Telefax Usage Logs & Reports		AV							



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F61	5.1.012	Charge Schedule/Price Lists	Schedules of prices charged by an agency for services to the public or other agencies, including any documentation used to determine the charges.	US	3						
F62	5.1.013	Insurance Policies	For vehicles, equipment, etc.	AC	4			AC= Expiration or termination of the policy according to its terms.			
A91	5.1.014	Office Procedures	Any internally distributed manual, guidelines, or similar records that establish standard office procedures for an agency; for example, agency style manuals, telephone protocols, mail room procedures, print shop and photocopy ordering instructions.	US	1						
A92	5.1.015	Correspondence Tracking Records	Any record created by an agency to track any type of incoming and outgoing correspondence or packages by the U.S. Postal Service or by private couriers.		1						
A93	5.2.002	Building Construction Project Files	Planning, design, and construction records; accepted and rejected bids, correspondence; etc.	AC	10			AC = Completion of project.	R	SEE ALSO item numbers 5.2.003 and 5.2.028	



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					Years	Months	Days				
A35	5.2.003	Building Plans and Specifications - State Owned	Includes architectural and engineering drawings, profiles, and blueprints. State owned:	LA					R	SEE ALSO item numbers 5.2.002 and 5.2.028. ARCHIVES NOTE: Archival Review designation is for state-owned building only.	
TEMP001	5.2.003	Building Plans and Specifications - Leased	Includes architectural and engineering drawings, profiles, and blueprints. State owned:	AC	2			AC = termination or cancellation of lease.		SEE ALSO item numbers 5.2.002 and 5.2.028. ARCHIVES NOTE: Archival Review designation is for state-owned building only.	
A36	5.2.008	Equipment History File; Equipment Service Agreements	Agreements or contracts between the agency and equipment vendor to provide maintenance service for equipment. Includes requests for installation, moves, service, etc.; and service/repairs logbooks, etc.	LA	3						
A37A	5.2.009	Equipment Inventory Detail Report Forms	Updates agency portion of the inventory listing and adds, changes, transfers, or deletes items from inventory.	FE	3						
A37B	5.2.010	Equipment Manuals		LA							
A37C	5.2.011	Equipment Warranties		AC	1			AC= Expiration of warranty.			



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A37D	5.2.012	Estimate Files (Supply and Repair Cost Estimates)			1						
A38	5.2.014	Inventory- Annual Physical	Property, equipment, supply verification.	FE	3						
A94	5.2.019	Service Orders	Agency copy of forms completed by mechanical service personnel for installation or repair. Includes billing code, service, labor, parts, and remarks.		1						
A95	5.2.021	Surplus Property Sale Reports		FE	3						
A74	5.2.023	Year-to-Date Activity (Inventory Listing)	Shows additions, changes, transfers, and deletions of information within the inventory system. Data include agency, division, tag number, batch, document, transaction date, location, item code, description, date, and cost.	FE	3						
A95	5.2.026	Facilities Reservation Logs	Reservation logs or similar records relating to the use of agency facilities such as meeting rooms, auditoriums, etc.		2						



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A75	5.2.027	Space Utilization Reports		AV							
A96	5.2.028	Building Construction Contract and Inspection Records	Building construction contracts, surety bonds, and inspection records.	LA	10				R	SEE ALSO item numbers 5.2.002 and 5.2.003.	
F63	5.3.002	Freight Bills Paid		FE	3						
F64	5.3.003	Freight Claims		AC	2			AC= Resolution of claim.			
F57	5.3.004	Orders - Acknowledgements		AV							
F58	5.3.005	Packing Slips		AV							
F35	5.3.007	Bid Documentation	Includes bid requisition/authorizations, invitations to bid or propose, bid specifications, accepted and rejected bids, and bid tabulation/evaluations.	FE	3					CAUTION: If a formal written contract is the result of a successful bid or request for proposal, the successful bid or request for proposal and its supporting documentation must be retained for the same period as the contract. SEE item number 5.1.001 and 5.2.028.	
F67	5.3.008	Purchasing Logs	Log, register, etc. providing a record of purchase orders issued, orders received, and similar date on procurement status.	FE	3						



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F66	5.3.009	Requests for Information	Requests for information preliminary to the procurement of goods or services by direct purchase or bid.	AC				AC = Date of direct purchase, issuance of request for bids, or decision not to proceed with the procurement, as applicable.			
A97	5.4.002	Evacuation Plans	Plans for evacuation of agency facilities in cases of emergency.	US							
A98	5.4.003	Inspection Records	Fire, safety, and other inspection records of agency facilities and equipment.	AC	3			AC = Inspection, or date of the correction of the deficiency if the inspection report reveals a deficiency.		CAUTION: Does not include inspection reports of building construction. See item number 5.2.028.	
A76	5.4.004	Fire Orders	Orders issued by Fire Marshal to correct deficiencies in compliance with the fire code.	AC	3			AC= Deficiency corrected.			
A77	5.4.011	Visitor Control Registers	Logs, registers, or similar records documenting visitors to limited access or restricted areas of agency facilities.		3						



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F13	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 agency or state facilities, equipment or automated systems.	AC	2			AC = Until superseded, date of expiration, or date of termination, whichever sooner.			
A18	5.4.013	Disaster Preparedness and Recovery Plans		US							
F60	5.5.001	Billing Detail- Telecommunications (Other than TEX-AN)	In addition to summary detail, includes any accompanying detailed listing of long distance calls.	FE	3					SEE item number 5.5.006 for TEX-AN billing detail.	
F66	5.5.002	Long Distance Telephone Logs	Long distance logs created by agencies for internal documentation purposes. Includes any similar logs created for long distance facsimile or electronic transmissions.	AV							



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					Years	Months	Days				
F61	5.5.006	Billing Detail - Telecommunications (TEX-AN)	In addition to summary detail, includes any accompanying detailed listing of long distance calls.	FE	3					The billing agency will maintain all long distance TEX-AN records and will provide each using agency its bill summary of centralized capitol complex telephone service without call detail records. For these bill summaries, SEE item number 4.7.011. SEE item number 5.5.001 for billing detail from carriers other than TEX-AN.	
A3	1.1.008	Correspondence - Matters Not Filed	External correspondence unsuccessfully attempting to file matters before the Court which are not under the Court's jurisdiction or purview.		2					SEE comment to item number 1.1.007.	
C56C	1.1	Sealed Records- Filed Rule 76a Notices	Notices filed with the Clerk documenting a party's written motion to seal court records.		20					Notices open to public inspection.	SEE: Texas Rules of Civil Procedure 76a(3).
C42	4.5.005	State Bar- Financial Reports			10						



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C48A	1.1	Attorney Licensing- Bar Exam Results		PM							
C48B	1.1	Attorney Licensing- Licensing Ceremony Programs		PM						One preserved per ceremony in May and November.	
C50	1.1	Attorney Licensing- Requests for Certificates of Good Standing		AV							
C51	1.1	Attorney Licensing- Probationary Licenses			3						
C54	1.1	Attorney Licensing- Unused License Drafts		AV							