



June 28, 2017

Shelley Murphy
Accountant
Texas Pension Review Board
300 W. 15th St. William P. Clements Bldg. Room 406
Austin, TX 78701

Re: Agency records retention schedule approved for use.

Dear Shelley,

Lorenzo de Zavala
State Archives and
Library Building

Your agency's records retention schedule is approved for use as of June 22, 2017 your currently approved records retention schedule is available on our website at <https://www.tsl.texas.gov/slrn/state/schedules.html>. Please ensure that all old copies of the schedule are superseded with this recertified copy.

1201 Brazos Street
Austin, Texas
78701

Your approved retention schedule provides you with continuing authorization to dispose of agency records according to its terms. Please note that state regulations (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.

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

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 June 2022.

www.tsl.texas.gov

Commission Chairman
Michael C. Waters

During a certification period, changes may need to be made to your schedule. State regulations (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, Gina Cervantes at 512-463-6623 or gcervantes@tsl.texas.gov.

Members

Sharon T. Carr
F. Lynwood Givens
Larry G. Holt

Romanita Mata-Barrera
Wm. Scott McAfee
Martha Wong

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.

Director and Librarian
Mark Smith

Sincerely,

Assistant State Librarian
Gloria Meraz

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 338

Agency Name Texas Pension Review Board

(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 Shelley Murphy
Name (Print or type) Shelley Murphy

Date 1/19/2016

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 Rebecca Cannon
Name (Print or type) REBECCA CANNON
Date 06.22.17

Cert/Recert No. 8 Amendment No. _____

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.





STATE OF TEXAS Records Retention Schedule

1. Agency Code: 338		2. Agency Name: State Pension Review Board										
3. Agency Item	4. Record Series Item No.	5. Record Series Title	6. Description	7. Retention Period			8. Event Based	9. Event Trigger	10. Archival	11. Remarks	12. Legal Citations	13. Amended
				Years	Months	Days						
1	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.	7			AC	AC = Publication or release of final audit findings.		The State Auditor's Office retains any copies of its audits performed on Texas state agencies.		
2	1.1.004	Legislation Appropriation Requests	Including any supporting documentation created and/or used to justify and support legislative appropriation requests by an agency.	6			AC	AC = September 1 or 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.		
3	1.1.006	Complaint Files	Complaints received by an agency from the public concerning the agency and records pertaining to the resolution of the complaint	2			AC	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.		

Event Triggers (Field 9)				Archival Codes (Field 10)	
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	US – Until Superseded	A/I – Transfer to State/University Archivist	R/O – Review by State/University Archivist
AV – Administrative Value	FE – Fiscal Year End	PM – Permanent			

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4	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, board or commission members, division directors and program heads require archival review. Contact the State Archives when these records have met their retention periods		
5	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 comments to item number 1.1.007		
6	1.1.010	Directives	Any document that officially initiates, rescinds, or amends general office procedures.	1			US					

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7	1.1.013	Calendars, Appointments 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.	1			CE		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. 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 records and subject to this retention period. See Open Records Decision 635 issued in December 1995 by the Attorney General.		
8	1.1.014	Legal Opinions and Advice	From agency legal counsel or the Attorney General, including any requests eliciting the opinions.	30					R	CAUTION: Does not include legal opinions or advice rendered on a matter in litigation or with regard to pending litigation.		
9	1.1.020	Public Information Requests–Not Exempted	Includes correspondence and documentation relating to requests for records that are furnished to the public under Public Information Act (Chapter 552, Government Code)	1			AC	AC = Date Request fulfilled.				

Event Triggers (Field 9) AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value CE – Calendar Year End FE – Fiscal Year End LA – Life of Asset PM – Permanent	Archival Codes (Field 10) A/I – Transfer to State/University Archivist R/O – Review by State/University Archivist
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10	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)	2			AC	AC = Date of notification that records are exempt.				
11	1.1.023	Organizational Charts					US		A			
12	1.1.024	Plans & 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.	3			AC	AC = Decision made to implement or not to implement result of planning process.	R	Archives Note: Data processing planning records are not archival.		
13	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.	1			AC	AC = Date of publication in the Texas Register				
14	1.1.027	Proposed Legislation	Drafts of Pension related legislation, actuarial analysis, actuarial reviews, impact statements, fiscal notes, and related correspondence.	12								
15	1.1.038	Customer Surveys	Surveys returned by the customers or clients of an agency, and the statistical data maintained rating an agency's performance	2				CAUTION: Do not dispose of until completion of final summary report.				
16	1.1.040	Speeches, Papers & Presentations	Notes or texts of speeches, papers, presentations, or reports delivered in conjunction with agency work.				AC	AC = End of term in office or termination of service in a state position	R			
17	1.1.041	Suggestion System Records	Suggestions submitted by agency personnel and responses.	1								

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18	1.1.043	Training Materials	Instructional materials developed by an agency for training entities or individuals it regulates or serves.	3			US			Agency is required to hold //Workshops regarding Pension Issues (Training and Education)		
19	1.1.048	Litigation Files		1			AC	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.		
20	1.1.055	Strategic Plans		6			AC	AC = September 1 of odd-numbered calendar years.	A	Archives Note: The archival requirement is met by sending the required copies of the plans to the Texas State Publications Depository Program, Texas State Library and Archives Commission.		
21	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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22	1.1.057	Transitory Information	<p>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 record keeping 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 ongoing 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.</p>				AC	<p>AC = Purpose of record has been fulfilled.</p>		<p>The disposal of transitory information need not be documented through destruction authorizations (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)</p>		

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23	1.1.058	Meeting Agenda & Minutes	(Board and Subcommittee Meetings) Official agenda minutes and supporting documents (includes exhibit items, documentation for agenda items, documents sent in advance of meetings for briefing purposes, some of which may not be submitted at an actual meeting) of state boards, committees, commissions and councils that conduct open meetings as required by Government Code, Chapter 551				PM		A	AGENCY NOTE: Agendas are filed with official copy of minutes. Archives Note: Agency retains permanent record copy. The archival requirement will be met by sending a copy to the Archives and Information Services Division, Texas State Library and Archives Commission.		
24	1.1.059	Meetings, Certified Agendas or Tape Recordings of Closed	Certified agendas or tape recordings of closed meetings of state boards, commissions, committees, or councils.	5			AC	AC = the date of the meeting or completion of pending action involving the meeting, whichever is later.			Government Code, 551.104(a).	
25	1.1.060	Meetings, Audio or Videotapes of Open		6			AC	AC = Official approval of written minutes of the meeting by the governing body of an agency.		CAUTION: Minutes of state agencies are permanent records. Audio and videotapes are not permanent media. State agencies		
26	1.1.061	Meeting – Notes	Notes taken during open meetings of state boards, commissions, committees, and councils, from which written minutes are prepared			90	AC	AC=Approval of the formal minutes by the governing board				
27	1.1.063	Staff Meeting Minutes and Notes	Minutes or notes, and supporting documentation taken at internal agency staff meetings.	1								

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28	1.1.064	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.	3			FE			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.		
29	1.1.065	Reports and Studies (Non-Fiscal) – Raw Data	Information or data collected and compiled for the purpose of producing non-fiscal reports.	2						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.		
30	1.1.066	Reports – Biennial or Annual Agency (Narrative)	Biennial narrative reports to the governor and legislature as required by an agency's enabling statutes, including annual narrative reports if they are required by statute.	6			AC	AC = September 1 of odd-numbered calendar years	A	ARCHIVES NOTES: The archival requirement is met by sending the required copies of the reports to the Texas State Publications Depository Program, Texas State Library and Archives Commission.		

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31	1.1.067	Reports & 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.	3					R	This series does not include Pension Plan Studies. SEE Agency No. PPF1.		
32	1.1.068	Reports on Performance Measures	Quarterly and annual reports on agency performance measures submitted to executive and legislative offices.	10			AC	AC = September 1 of odd-numbered calendar years.				
33	1.1.069	Reports - Activity	Reports compiled by agency personnel on a daily or other periodic basis pertaining to workload monitoring, task completion times, number of public contacts and similar activities.	1						CAUTION: SEE item number 1.1.064.		
34	1.1.070	Agency Rules, Policies & Procedures - Final	Manuals, guidelines, administrative rules, or similar records and working files used in the development of agency rules, policies and procedures 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, polices, and procedures that govern an agency's programs, services or projects.	6			AC	AC = Completion or termination of program, rules, policies or procedures.	R			

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35	1.1.072	Public Information Reports	Reports made to the Office of the Attorney General on an agency's Public Information Act activities.	2								
36	1.1.074	Sunset Review Report and Documentation		3			AC	AC=After the subsequent Sunset Review.	R			
37	1.2.001	Destruction Authorizations	Agency level documents authorizing final disposition of records under a certified records retention schedule.	3			FE					
38	1.2.004	Forms Inventory	Any periodic listing of all forms used internally or externally by an agency.				US					
39	1.2.005	Records Retention Schedule (SLR 105)	Agency Copy. Includes documentation of certification and approval - forms SLR 105C and/or other forms designated by the State Records Administrator.				US			Original is maintained by the State and Local Records Management Division, Texas State Library and Archives Commission.		
40	1.2.006	Records Transmittal Forms	Agency Copy (includes RMD 101. TX-R-5, 3067-58-1, and Agency Storage Forms). Forms indicate records transferred to storage or a transfer of legal custody.	2			AC	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.				
41	1.2.008	Request for Authority to Dispose of State Records (RMD 102)	Agency copy.	3			FE			Original is retained by the State and Local Records Management Division, Texas State Library and Archives Commission.		

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42	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 and Archives Commission, showing records series title, dates of records and date destroyed or transferred.	10								
43	1.2.011	Records Center Approval Forms (RMD 106)	Agency Copy.				US					
44	1.2.012	Records Inventory Worksheets					US					
45	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.	1			US					
46	1.2.015	Disaster Recovery Service Transmittals (RMD 109)	Also includes documentation for disaster recovery services provided by other entities.	1			FE					
47	1.2.016	Disaster Recovery Service Approval Form (RMD 113)	Agency copy of form				AC	AC = Until superseded or termination of service.				

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48	1.3.001	State Publications	<p>One copy of each state publication defined as "information in any format that is produced by the authority of or at the total or partial expense of a state agency or is required to be distributed under law by the agency, and is publicly distributed", except a publication that is subject to a different retention period in this schedule. For example, a meeting agenda (see item number 1.1.058) also meets the definition, but it must be retained permanently.</p>	2			AC	<p>AC = Until superseded or obsolete</p>	<p>CAUTION: Many state publications must be submitted to the Texas State Publications Depository Program, Texas State Library and Archives Commission, by law (Government Code 441.101-441.106). The Texas State Library and Archives Commission will retain a copy of all state publications submitted to it on a continuing basis, subject to periodic evaluation to determine if the publication merits further retention.</p> <p>For additional information and requirements concerning state publications made available to the public through the Internet, consult the administrative rules of the Texas State Publications Depository Program of the Texas State Library and Archives Commission (13 TAC §§3.1-3.16).</p>			

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49	1.3.002	Publication Development Files	Background material, copy (drafts), original artwork, photo negatives, prints, flats, etc. This includes all work performed both inside and outside the agency.	1					R			
50	2.1.002	Master Files	Relatively long-lived computer files containing organized and consistent sets of complete and accurate electronic records. Examples include, but are not limited to, date tables of relational databases used by applications or computer programs.				PM					
51	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.		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	
52	2.1.008	Hardware Documentation	Records documenting operational and maintenance requirements of computer hardware such as operating manuals, hardware/operating system requirements, hardware configurations, and equipment control systems.				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	

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53	2.2.014	Internet Cookies	Data resident on hard drives that make use of user-specific information transmitted by the Web server onto the user's computer so that the information might be available for later access by itself or other servers.		6					The disposal of Internet cookies need not be documented through destruction authorizations (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).		
54	2.2.015	History Files – Web Sites	A record of the documents visited during an Internet session that allows users to access previously visited pages more quickly or to generate a record of usage of a state-owned computer.		6					The disposal of history files need not be documented through destruction authorizations (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).		
55	2.2.016	Software Registrations, Warranties and License Agreements		3			LA					
56	3.1	Board Member Files	Individual files on board members - dates served, historical information, resolutions, resumes.				PM					

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57	3.1.001	Application 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	
58	3.1.002	Application 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.	5			AC	AC = Termination of employment.				
59	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.		
60	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	

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61	3.1.014	Employee Selection Records	Includes notes of interviews with candidates, questions asked of applicants, audio and videotapes of job interviews, driving record and previous injury checks, pre-employment physical examination, preemployment 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	
62	3.1.018	Grievance Records	Records relating to the review of employee grievances against personnel policies, working conditions, etc.	2			AC	AC = Final decision on the grievance.		CAUTION: Does not include formal complaints filed by an employee with the Equal Employment Office (EEO) of the U.S. Dept. of Labor.		
63	3.1.019	Performance Appraisals		2							29 CFR 1602.32(c)	
64	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.	5			AC	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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65	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.	5			AC	AC = Termination of employment.				
66	3.1.022	Personnel Information or Action Forms	Forms or similar records used to create or change information concerning the records or an employee, including pay grade, position classification, employee number, evaluation date and termination of employment.	2							29 CFR 1602.31	
67	3.1.023	Position/Job Descriptions	Job descriptions, including all associated task or skill statements, for positions in an agency.	4			AC	AC = Until superseded or job eliminated.			40 TAC 815.106(i)	

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68	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	AC = The criminal history record has served the immediate purpose for which it was obtained.		CAUTION: An agency that is authorized to obtain a criminal history record information from DPS must refer to its agency's legislation or see Subchapter F, Chapter 411, Government Code for appropriate retention and use of this information.		
69	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.	5			AC	AC = Termination of employment.				
70	3.1.029	Employment Eligibility	Documentation or Verification of Federal reporting form (INS I-9)	1			AC	AC = termination of employment.		CAUTION: Federal regulation requires that INS I-9 forms be retained for 3 years from date of hire or 1 year after separation of the employee, whichever is 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)	

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71	3.1.031	Employee Benefits – Other than Insurance	Agency copies of information relating to the selection of available benefit options other than insurance, i.e. Deferred compensation (457), TexSaver 401(k) plan, Legal Protection Plan, TexFlex reimbursement accounts, direct deposit of pay, etc.	2			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.		
72	3.1.037	Employee Recognition Records	Awards, incentives, tenure, etc.	5			AC	AC = Termination of employment.				
73	3.1.038	Public Access Option Form	Form completed and signed by employee, official, former employee or former 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		
74	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.	4			AC	AC = After termination of employee or after amendment, expiration, or termination of authorization, whichever is sooner.				
75	3.2.002	Employee Earnings Records		4							40 TAC 815.106(i)	
76	3.2.003	Federal Tax Records	Includes W2, FICA, and other records.	4			AC	AC = Tax due date, date the claim is filed, or date tax is paid whichever is later.			26 CFR 31.6001 - 1(e)(2)	

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77	3.2.005	W-4 Forms	Employer's copy of "Employee Withholding Exemption Certificate".	4			AC	AC = Until superseded, obsolete or upon separation of employee.			26 CFR 31.6001 - 1(e)(2)	
78	3.2.007	Unemployment Compensation Records		5			AC					
79	3.2.008	Direct Deposit Applications/Authorizations					US					
80	3.2.009	State Deferred Compensation Records		5			AC	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 recent edition of the Benefits Coordinator Reference Manual issued by the Employees Retirement System of Texas.		
81	3.2.010	Human Resources Information System (HRIS) Reports	Includes supporting documentation	4			AC	AC = 30 days after report date				
82	3.3.001	Affirmative Action Plans	Affirmative action plans for both regular employees and apprenticeship programs.	5							29 CFR 30.8(e) for apprenticeship plans.	
83	3.3.004	Benefit Plans	Employee benefit plans such as pension; life, health, and disability insurance; deferred compensation; etc., including amendments	1			US				29 CFR 1627.3 (b)(2)	

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84	3.3.011	Former Employee Verification Records	Minimum information needed to verify employment, includes name, social security number, and exact dates of employment, last known address and most recent public access option form.	75			AC	AC = termination of employment				
85	3.3.015	Positions/Job Classification Review File	Records relating to review and monitoring of job classifications within an agency.	3			US					
86	3.3.020	Work Schedules/Assignments	Work, duty, shift, crew, or case schedules, rosters, or assignments.	1								
87	3.3.022	Texas Workforce Commission (TWC) Reports	Report to the agency from TWC or its predecessor pertaining to employees.	3								
88	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.	3			FE					
89	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.	3			US					

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90	3.3.025	Job Procedure Records	Any documents detailing the procedural duties and responsibilities of agency positions on a position-by-position basis.	3			US					
91	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.	3			US					
92	3.3.030	Training Administration Records	Instructional materials and other records associated with in-house training of agency personnel on personnel policies and procedures that govern an agency's programs, services, or projects.	2			US			CAUTION: Does not include hazardous material training records. SEE item number 5.4.007.		
93	3.3.031	EEO Reports & Supporting Documents	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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94	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.	3			FE					
95	3.4.002	Leave Status Reports	Cumulative report is issued each pay cycle and provides employee leave status information for each position.	3			FE					
96	3.4.007	Time off and/or Sick Leave Requests		3			FE					
97	4.1.005	Inventory and Other Cost Files	Production, job, labor, quotes, pricing, specifications, etc.	3			FE					
98	4.2.001	Cash Deposit Vouchers		3			FE			Fees for Open Records requests, cash payments for seminar attendees, etc.		
99	4.2.002	Cash Receipts		3			FE					
100	4.2.005	Purchase Vouchers	Requisitions, orders, receiving reports, invoices, or statements, change orders, best value determinations, etc.	7			AC	AC = Expiration or termination of the instrument according to its terms.				
101	4.2.003	Daily Cash Receipts Logs		3			FE					
102	4.2.007	Expenditure Vouchers	Travel, payroll, etc.	3			FE					
103	4.4.003	Accounts Payable Ledgers	Listing of accounts paid by the agency (included in the budget).	3			FE					

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104	4.5.001	Worksheets for Preparing Fiscal Reports	Financial reports, travel reports, retirement reports, telecommunication reports, etc.	3			FE					
105	4.5.002	Internal Fiscal Management Reports	Includes agency monthly budget reports	3			FE					
106	4.5.003	Annual Financial Reports		6			AC	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.		
107	4.5.006	Annual Operating Budgets	Budget work papers, supporting figures, instructions	3			FE					
108	4.6.001	Balancing Records	Appropriations month end control printouts	3			FE					
109	4.6.002	Reconciliations Comptrollers Reports		3			FE					
110	4.7.001	Accounting Policies and Procedures Manual		3			US					
111	4.7.004	Capital Asset Records		3			LA					

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112	4.7.006	Comptroller Statements		3			FE					
113	4.7.009	Fixed Asset Sequential Number Logs		3			US					
114	5.1.001	Cotracts & Leases	Contracts, leases and agreements include general obligation, land lease, utilities, and construction except for buildings.	7			AC	AC = Expiration or termination of the instrument according to its terms.				
115	5.1.004	Mail & Telecommunications Listings					US					
116	5.1.005	Postage Expense Records		3			FE					
117	5.1.012	Charge Schedules/Price Lists		3			US					
118	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/repair logbooks, etc.	7			LA					
119	5.2.010	Equipment Manuals					LA					
120	5.2.011	Equipment Warranties		1			AC	AC = Expiration of Warranty.				
121	5.2.014	Inventory - Annual Physical		3			FE					
122	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								

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123	5.4.002	Evacuation Plans	Plans for evacuation of agency facilities in cases of emergency.				US					
124	5.4.007	Hazardous Materials Training Records	Records of training given employees in an agency hazard communications program.	5							Texas Health and Safety Code, 502.009(g).	
125	5.4.011	Visitor Control Registers	Logs, registers, or similar records documenting visitors to limited access or restricted areas of agency facilities.	3								
126	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 facilities, equipment or automated systems.	2			AC	AC = Until superseded, date of expiration, or date of termination, whichever is sooner.				
127	5.4.013	Disaster Preparedness and Recovery Plans					US					
128	5.5.001	Billing Detail - Telecommunications	(Other than TEX-AN)	3			FE					
129	5.5.006	Billing Detail - Telecommunications (TEX-AN)		3			FE					
130	5.6.009	Parking Permits or Assignments					US					
PPF1		Pension Plan Files – Essential Information	Registration forms, actuarial audits, membership information, investment policies, complaints, board of trustees information, board meeting agendas and minutes, and studies and comparison studies.	30								

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PPF2		Pension Plan Files – Non-essential Information	Board meeting packets, seminar packets, presentations, nonregistered plan complaints and news articles.	2						The series includes any additional information received by the agency regarding a pension plan that is not used for compliance.		

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