

October 11, 2021



John Perryman, Chief Financial Officer
Texas Bond Review Board
300 W. 15th St., #409
William P. Clements Building
Austin, TX 78701

Dear Mr. Perryman,

Your agency's records retention schedule is approved for use as of **10/8/2021**, 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 Please ensure that all old copies of the schedule are superseded with this certified copy.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

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 **October 2026**.

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

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 that reads "Megan Carey".

Megan Carey, RMA Manager on behalf of 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 352

Agency Name Texas Bond 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

Name (Print or type) John Perryman

Date 06-07-2021

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

Not Required at This Time

Name (Print or type)

Date

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

10/8/2021

Cert/Recert No.

6

Amendment No.

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
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					Years	Months	Days				
FI.001		Annual Reports - Other Agencies	Distributed printed copy. Non-fiscal.		2						
FI.002		Research Bond Issuance	Research includes Consultants, Debt Status, and Mgt Issues, Municipal Bonds, College Savings Bonds, Legal Issues, Ratings and Programs. Association: Research includes correspondence, resource material, reports, organization, etc. Other Agency: Research includes correspondence, financial data, studies, surveys, and program data.		10						
FI.003		Semi-Annual, Annual & Biennial Reports - Issuers	Reports from issuers regarding status of unspent bonds proceeds, expected bond issuance over coming fiscal year, bond transaction results/analysis, and status of authorized, but unissued debt.	US	3						
FI.004		Bond Issue/Application Folders	Includes Application/Notice of Intent, Staff and Board Meeting Documents, Final Report/Sale Documents, and Correspondence.	AC	36			AC = Application approved.		Agency will maintain active paper files for one year prior to storage in Office Storage room. Will be destroyed after one year after maturity of application.	
FI.005	1.1.002	Audits	Audit reports received from the State Auditor's Office.	AC	7			AC = Publication or release of final audit findings.		State Auditor's Office retains the permanent record copy.	



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FI.006	1.1.004	Legislative Appropriation Requests	Including supporting documentation.	AC	6			AC = September 1 of odd-numbered calendar year.		ARCHIVES NOTE: The final version of Legislative Appropriation Requests must be submitted to the Texas State Publications Depository Program per 13 TAC 3.3(a)(3)(A). Working files and related documentation used in creating the final plan are not subject to archival review and may be disposed of at the expiration of the retention period.	



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FI.007	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 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 RSIN 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 RSIN 1.1.004; a letter concerning an audit for that prescribed by RSIN 1.1.002, etc. See also RSIN 1.1.011.	



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FI.008	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 an agency.		2					See comment to RSIN 1.1.007. See also RSIN 1.1.010.	
FI.009	1.1.010	Directives	Any document that officially initiates, rescinds, or amends general office procedures.	US	1						
FI.010	1.1.011	Executive Orders	Any document that initiates, rescinds, or amends a regulation, policy, or procedure that governs the programs, services, or projects of an agency.	US	5				A		



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FI.011	1.1.013	Calendars, Appointment, and Itinerary Records	Calendars, appointment books or programs and scheduling, or itinerary records maintained by staff during business hours that document appointments, itineraries, and other activities of agency officials or employees.	CE	1				R	<p>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.</p> <p>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.</p>	



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FI.012	1.1.014	Legal Opinions & 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, or opinions rendered for Public Information Act Requests. See RSIN 1.1.020 and 1.1.021. ARCHIVES NOTE: Opinions and advice 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.	
FI.013	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		
FI.014	1.1.020	Public Information Requests - Not Exempted	Includes all correspondence and documentation relating to requests of records that are furnished to the public under the Public Information Act (Chapter 552, Government Code).	AC	1			AC = Date request fulfilled.			
FI.015	1.1.021	Public Information Requests - Exempted	Includes all correspondence and documentation relating to requests for records.	AC	2			AC = Date of notification that records are exempt.			



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FI.016	1.1.023	Organization Charts	Charts or diagrams that show the structure of an agency 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 state agency 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.	
FI.017	1.1.024	Plans & Planning Documents	Plans and records relating to the process of planning new or redefined programs, services, or projects of an agency that are neither included in nor 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	Annual review. ARCHIVES NOTE: Data processing planning records are not archival.	
FI.018	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.			
FI.019	1.1.027	Proposed Legislation	Drafts of proposed legislation and related correspondence.	AV							
FI.020	1.1.038	Customer Surveys	Surveys soliciting feedback from customers or clients of an agency, and the statistical data maintained rating an agency's performance.	AC	3			AC = Final disposition of summary report, or date of decision not to produce a report, as applicable.			



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FI.021	1.1.055	Strategic Plans	Operational strategic plans, which include descriptions of information resources programs, prepared in accordance with Government Code, 2054.095 and 2056.002. Includes working files and related documentation used in creating the final plan.	AC	6			AC = September 1 of odd-numbered calendar years.		ARCHIVES NOTE: The final version of Strategic Plans must be submitted to the Texas State Publications Depository Program per 13 TAC 3.3(a)(2)(C). Working files and related documentation used in creating the final plan are not subject to archival review and may be disposed of at the expiration of the retention period.	
FI.022	1.1.056	ADA (Americans with Disabilities Act) Documentation	Self evaluations and plans documenting compliance with requirements of the Americans with Disabilities Act.		3						28 CFR 35.105(c).



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FI.023	1.1.057	Transitory Information		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 record series listed on 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 state agency or the documentation of its functions. The disposal of transitory information need not be documented through authorizations or in records disposition logs.	



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					Years	Months	Days				
FI.024	1.1.058	Meeting Minutes/Agenda/Witness Cards	Official minutes, agendas, and witness cards for Bond Review Board staff planning and Board meetings.	PM					A	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. Agenda should be filed with the official copy of minutes. Agency of origin retains permanent record copy and sends appropriate copies to the Legislative Reference Library, Governor's Office. CAUTION: This record series and item number 1.1.059, 1.1.060, and 1.1.061 must be used for those state boards, committees, commissions, and councils, which by law or by biannual Appropriations Act are administered by another state agency.	
FI.025	1.1.059	Meetings, Agendas and Minutes or Audiovisual Recordings of Closed	Agendas, minutes, or audiovisual recordings of closed meetings of state boards, commissions, committees, and councils.	AC	2			AC = The date of meeting or completion of pending action involving the meeting, whichever is later.		SEE CAUTION Comment at item number 1.1.058.	Government Code, Section 551.104.



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FI.026	1.1.060	Meetings, Audiovisual Recordings of Open	Audiovisual recordings of open meetings of state boards, commissions, committees, and councils.	AC			90	AC = Official approval of written minutes of the meeting by the governing body of an agency.		CAUTION: It is an exception to the AC+90 days retention that if an agency does not prepare written minutes, it must retain recordings of open meetings permanently, following the same retention requirements of RSIN 1.1.058. See also caution comment at RSIN 1.1.058.	
FI.027	1.1.065	Reports, 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 record series in this schedule. See RSIN 1.1.067 for reports produced from raw data.	



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					Years	Months	Days				
FI.028	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. Includes working files and related documentation used in creating final report.	AC	6			AC = September 1 of odd-numbered calendar years.		ARCHIVES NOTE: The final version of these agency reports must be submitted to the Texas State Publications Depository Program per 13 TAC 3.3. The requirement is met by sending the required copies of the reports to the Texas State Publications Depository Program, Texas State Library and Archives Commission. Working files and related documentation used in creating the final report may be disposed of at the expiration of the retention period.	Government Code, Section 441.101.
FI.029	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	ARCHIVES NOTE: Reports are archival when they deal with significant aspects of the agency's programs. For agencies that have had an archival appraisal, separate this records series by each type of archival coding A, R, or E. See RSIN 1.1.065 for raw data used to produce reports.	



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FI.030	1.1.068	Reports on Performance Measures	Quarterly and annual reports on agency performance measures submitted to executive and legislative offices.	AC	6			AC = September 1 of odd-numbered calendar years.		Agency of origin retains permanent record copy and sends required copies to the Legislative Budget Board, Governor's Office, and Publications (semi-annual and annual). Includes RSIN 1.1.064.	
FI.031	1.1.070	Agency Rules, Policies & Procedures - Final	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. Includes working files and related documentation used in creating rules, policies, and procedures.	AC	3			AC = Until superseded, or termination of program, rules, policies, or procedures, whichever applicable.	R	ARCHIVES NOTE: Working files and related documentation used in creating the final rules, policies, and procedures, are not subject to archival requirement and may be disposed of at the expiration of the retention period.	
FI.032	1.1.070	Agency Rules, Policies, & Procedures - Working Files	Guidelines, directives, administrative rules, policies, or procedures issued by an organization in fulfilling legislative mandates or missions, the results of which usually impose requirements or have an effect on other entities. Includes disclosure guidelines, SEC requirements, and state information depository protocol.	AC	3			AC = Until superseded, or termination of program, rules, policies, or procedures, whichever applicable.	R	Includes RSIN 3.3.024.	



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FI.033	1.2.005	Records Retention Schedule	A records retention schedule (i.e. form SLR 105) that identifies the records that are created and maintained by an agency, provides the minimum timeframes the records must be retained, and includes instructions for their disposition. This series may include working files and documentation of certification and approval by the Texas State Library and Archives Commission.	US						Original is retained for 50 years by the State and Local Records Management Division, Texas State Library and Archives Commission.	



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FI.034	1.3.001	State Publications	One copy of each state publication as defined on page xi of this schedule, except a publication that is subject to a different retention period in this schedule. For example, a meeting agenda (see RSIN 1.1.058) also meets the definition, but it must be retained permanently; RSIN 1.1.004, 1.1.055, 1.1.066, 1.1.068, and 4.5.003, which also meet the definition, are closely associated with the appropriations process and must be retained AC + 6.	AC	2			AC = Until superseded or obsolete.		CAUTION: Many state publications must be submitted to the Texas State Publications Depository Program, Texas State Library and Archives Commission, by law (Government Code, 441.103-441.105). 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. 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 §3.1-3.8).	



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FI.035	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 agency.	AC				AC = Fiscal year end in which publication was finalized.	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 agency programs as well as the potential for re-use, may be archival. See RSIN 1.3.001 for final State Publications created from development files.	
FI.036	2.1.007	Software Programs	Agency-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.



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FI.037	2.1.008	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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FI.038	2.1.009	Technical Documentation	Records adequate to specify all technical characteristics necessary for reading or processing of electronic records and allow for their timely, authorized disposition including documentation describing how a system operates and necessary for using the system such as user guides, system or subsystem definitions, system specifications, input and output specifications, and system flowcharts; program descriptions and documentation such as program flowcharts, program maintenance logs, change notices, and other records that document modifications to computer programs; and data documentation necessary to access, retrieve, manipulate, and interpret data in an automated system such as a data element dictionary; file layout, code book, or table, 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 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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FI.039	3.1.001	Applications for Employment - Not Hired	Includes 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 of advertisement.	AC	2			AC = Date of the making of the record or the personnel action involved, whichever occurs later.			29 CFR 1602.31.
FI.040	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.			
FI.041	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.			
FI.042	3.1.011	Employee Benefits	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.	
FI.043	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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FI.044	3.1.013	Employment Contracts	Includes bids, Request for Proposals, and contracts for consultants.	AC	7			AC = Expiration or termination of contract according to its terms.			GC 441.1855.
FI.045	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, pre-employment 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.		CAUTION: Does not include criminal history checks; see RSIN 3.1.026.	29 CFR 1602.31.
FI.046	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 (DOL).	
FI.047	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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FI.048	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 corrective action.		CAUTION: If, during the retention period of the record series, any part of this series is used to document and support personnel disciplinary action under item number 3.1.021, all documentation from the series used to support disciplinary action must be retained for the minimum retention period described by item number 3.1.021.	
FI.049	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 workforce, and for failure to improve performance or conduct following imposition of corrective action. May include cause of 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.			



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FI.050	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.
FI.051	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).
FI.052	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.			
FI.053	3.1.029	Employment Eligibility Documentation	Federal reporting form (Form I-9).	AC	1			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).
FI.054	3.1.011	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.	



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FI.055	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 RSIN 3.1.014 for resumes, whether solicited or unsolicited, that are used in any way in the employment selection process.	
FI.056	3.1.036	Apprenticeship Records	Summary of applicant qualifications, evaluation basis for selection rejection, original applications, job assignments, promotions, separations, layoffs, terminations, compensation records, conditions of work, time records, hours of training provided (separate from labor), minority status, and gender of all selected and rejected applicants.		5						29 CFR 30.8(e).
FI.057	3.1.037	Employee Recognition Records	Awards, incentives, tenure, etc.	AC	5			AC = Termination of employment.			
FI.058	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						CAUTION: Most recent public access election information must be kept as long as the former employee verification records. See RSIN 3.3.011.	
FI.059	3.2	Payroll Reports	Includes employee earnings, federal tax, and Texas Workforce Commission reports with backup documentation.	AC	5			AC = Paid or claim date.		Includes RSINs 3.2.003 and 3.2.005.	Federal Tax Records: 26 CFR 31.6001-1.



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FI.060	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.			
FI.061	3.2.009	State Deferred Compensation	Records documenting the amount of pension or deferred compensation earned by individual employees.	AC	4			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, see the most current edition of the Benefits Coordinator Reference Manual issued by the Employees Retirement System of Texas.	
FI.062	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 item number 3.1.038.	
FI.063	3.3.015	Positions/Job Classification Review File	Records relating to review and monitoring of job classifications within an agency.	US	3						
FI.064	3.3.031	EEO Reports and Supporting Documentation	Includes documentation used to complete EEO (Equal Employment Opportunity) reports.		3						29 CFR 1602.32, 1602.48, and 1602.50.



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FI.065	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					Includes RSIN 3.4.007.	40 TAC 815.106(i).
FI.066	4.1.001	Vouchers - Purchase & Expenditure	Includes paid purchase, expenditure, and encumbrance vouchers (including Billing Detail-Telecommunications), Comptroller vouchers signatures, and bailment warrant pickup.	FE	3					See item number FI.085 for capital asset, inspection, repair, and maintenance records.	
FI.067	4.1.009	General & Subsidiary Ledgers		FE	3						



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FI.068	4.5.003	Annual Financial Reports	Annual Financial Reports (AFR) required by the General Appropriations Act (100 Day Report).	AC	6			AC = September 1 of odd-numbered calendar years.		ARCHIVES NOTE: The final version of Annual Financial Reports must be submitted to the Texas State Publications Depository Program per 13 TAC 3.3(a)(2)(a). Working files and related documentation used in creating the final plan are not subject to archival review and may be disposed of at the expiration of the retention period. CAUTION: If an agency does not produce a biennial or annual narrative report as described in RSIN 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.	
FI.069	4.7.001	Accounting Policies & Procedures	Records documenting the internal and external procedural requirements with respect to the accounting department of a state agency.	US	3						



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FI.070	4.7.001	Payroll Policies & Procedures	Includes Withholding and Classification Schedule, FICA info and vouchers, Texas Facilities Commission contract, and setups and policy manuals.	US	3					FICA = Federal Insurance Contributions Act.	
FI.071	4.5.002	Comptroller Statements & Monthly Cash Reconciliations	Monthly computer printout of fund balances with reconciliations to general ledger.	FE	5						
FI.072	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	4			AC = Until superseded, date of expiration, or termination of employee, whichever sooner.			
FI.073	5.1.001	Contracts and Leases		AC	7			AC = Expiration or termination of the instrument according to its terms.			GC 441.1855.
FI.074	5.1.004	Mail & Telecommunications Listings	Any mailing address, telephone or fax number, or email address records maintained by an agency on its employees or on entities or persons it serves.	US							
FI.075	5.2.006	Inventory, Annual Physical	Physical inventory including capital and non-capital asset records sequential number logs.	FE	3					See item number FI.085 for capital asset, inspection, repair, and maintenance records.	



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FI.076	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.	AC	2			AC = Until superseded, date of expiration, or date of termination, whichever sooner.			
FI.077	5.4.013	Disaster Preparedness & Recovery Plans	Includes Disaster Recovery Plan, Contingency Plan for Business Interruption, correspondence, reports, policy and procedures manuals.	US							
FI.078	5.5.002	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 FI.079 for TEX-AN billing detail.	
FI.079	5.5.002	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 bills summary of centralized capital complex telephone service without call detail records. SEE item number FI.078 for other than TEX-AN billing detail.	
FI.080	1.1.040	Speeches, Papers, and Presentations	Notes or text of speeches, papers, presentations, or reports delivered in conjunction with agency 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.	



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FI.081	1.1.043	Training Materials	Instructional materials and other records developed by an agency associated with training the entities or non-personnel individuals it regulates or serves, 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.			
FI.082	1.2.010	Records Disposition Logs	Logs or similar records listing records disposed of by an agency, which might include records series title, dates of records, and date of disposition.		10					CAUTION: Disposition can mean destroyed or transferred.	
FI.083	5.4.011	Visitor Control Registers	Logs, registers, or similar records documenting visitors to limited access or restricted areas of agency facilities.		3						
FI.084	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.	



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					Years	Months	Days				
FI.085	4.7.004	Capital Asset, Inspection, Repair, and Maintenance Records	Documentation relating to the capital and fixed assets of a state agency, 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 agency owned equipment and property; or equipment history file, which may include logbooks and requests for installation, moves, service, repair, etc.	LA	3					For service agreements or contracts related to equipment repairs and service, retain in accordance with RSIN 5.1.001. Includes RSIN 5.2.008.	
LG.001		Cities, Counties and Community Colleges	Bond issue documents and schedules. Also state sales and use tax analysis reports, sales tax allocation summaries for intercept program, completed surveys, and debt database reports.	AC	3			AC = Maturity of bond issue.		Agency will maintain active paper files in File Room. Databases on computer printouts and electronic media.	
LG.002		Research, Bond Issuance Research	Includes consultants, debt status, and management issues, municipal bonds, bond banks, legal issues, ratings, and programs. Associated research includes correspondence, resource material, reports, organization, etc. Bond Review Board, outside, and other states' research includes correspondence, financial data, studies, surveys, and program data.		5						



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
E – Exempt from archival review and transfer

1. Agency Code: 352		2. Agency Name: Texas Bond Review Board									
3. Agency Item No.	4. Record Series Item No.	5. Record Series Title	6. Description	7. Ret. Code	8. Retention Period			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
LG.003		School Districts	Bond issue documents and schedules. Also school districts valuation data, budgets, bond election requests, and completed surveys in database. Also school finance legislation and litigation.	AC	3			AC = Maturity of bond issue.		Agency will maintain active paper files in File Room. Databases on computer printout and electronic media.	
LG.004		Special Districts	Bond issue documents and schedules. Also sales tax allocation summaries, completed surveys, and debt database reports on health/hospital districts, water districts, or other special districts and related governments formed, and non-profit corporations.	AC	3			AC = Maturity of bond issue.		Agency will maintain active paper files in File Room. Databases on computer printout and electronic media.	
LG.005	1.1.024	Plans & Planning Records	Includes loans and grants reference material, request for proposals, rules, working group meeting minutes, program legislation, and historical program materials. (Public School Facilities Funding Program - PSFFP).	AC	3			AC = Date of decision to implement or not to implement.	R	PSFFP rules repealed in 2001, legislation repealed in 2005.	
PAB.001		Private Activity Bond Allocation Applications			43					Agency will maintain active paper files for 5 years prior to transfer to State Records Center (SRC) for filming. Paper files destroyed at SRC after filming. Master film at SRC. Duplicate at agency.	



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					Years	Months	Days				
PAB.002		Never reserved, withdrawn or cancelled pre-reservation Private Activity Bond Applications (Transitory Information)		AC				AC = Purpose has been fulfilled.		Paper and/or electronic. The disposal of transitory information need not be documented through destruction signoff or in record disposition logs.	
PAB.003		Withdrawn or Canceled Reserved Private Activity Bond Applications		AC	1			AC = Purpose has been fulfilled.		The disposal of transitory information need not be documented through destruction signoff or in record disposition logs. Paper and/or electronic.	
PAB.004		Closed Private Activity Bond Applications		AC	36			AC = Application approved.		Agency will maintain files for a year prior to transfer to State Records Center for paper storage. Files destroyed at State Records Center at the end of storage retention period. Database on computer printout and electronic media.	
PAB.005		Research - Private Activity	Research includes capital formation, Resolution Trust Corporation's multifamily program, Texas Economic Development and Tourism Office programs, reissuance, federal financing programs, census/population data, and allocation tracking. Other state research includes incentives.		5						