



State and Local
Records Management

P.O. Box 12927
Austin, Texas
78711.2927

4400 Shoal Creek Blvd.
Austin, Texas
78756

www.tsl.texas.gov

Commission Chairman
Michael C. Waters

Members
Sharon T. Carr
Martha Doty Freeman
F. Linwood Givens
Larry G. Holt
Wm. Scott McAfee
Sandra J. Pickett

Director and Librarian
Mark Smith

Assistant State Librarian
Edward Seidenberg

*Preserving yesterday,
informing today,
inspiring tomorrow.*

February 26, 2014

Mr. Kyle Smith
Staff Attorney
Texas Funeral Service Commission
333 Guadalupe Street, Suite 2-110
Austin, TX 78701

Re: Agency records retention schedule amendment approved for use

Dear Mr. Smith:

Amendment 2 to your agency's 9th recertification of your records retention schedule is approved for use as of Friday, February 21, 2014. Your currently approved records retention schedule and all amendments are available on our website at <https://www.tsl.texas.gov/slrn/state/schedules.html>. Please maintain this amendment with your currently approved schedule so that it can be easily referenced.

We appreciate your efforts in maintaining an up-to-date schedule. Making additions and changes to your schedule as you identify them not only ensures the integrity of your recordkeeping practices, but keeps your agency in compliance with state regulations (13 TAC §6.4) requiring the submission of any needed amendments to a retention schedule during its certification period to keep the information in the schedule current.

We will notify you of the date your schedule is due for recertification. Any additional approved amendments to your schedule, such as this one, should be incorporated into your main retention schedule prior to submitting it for recertification.

Thank you again for your commitment to complying with state records management laws and regulations. If we can provide any assistance to you, please contact the Government Information Analyst assigned to your agency, Angela Ossar, at 512-463-6623 or aossar@tsl.texas.gov.

Sincerely,

Craig Kelso
Director and State Records Administrator

Enclosure
cc: State Auditor, State Archivist
cc: (without enclosure) Dona Potter

R01.513/513



Texas
State Library
and Archives
Commission

STATE OF TEXAS

Records Retention Schedule Certification

AD

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 513

Agency Name TEXAS FUNERAL SERVICE COMMISSION

(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 [Signature]

Name (Print or type) Janice S. McGeary

Date JANUARY 17, 2014

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 [Signature]

Name (Print or type) _____

Date 02-21-2014

Cert/Recert No. 9 Amendment No. 2

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 Amendment

SLR 122

Form SLR 105C must accompany this form.

1. Page 1 of 1

2. Agency Code 513		3. Agency Name Texas Funeral Service Commission								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. Current Schedule		12. Amend. Type
			Agency	Storage	Total			9. Remarks	Page No.	

1.1	1	Individual Licensing Files – Both Funeral Director and Embalmer or Dual License	AC+1		AC+1	AC = License expired, terminated, or revoked. Such Licenses may not be reissued after 1 year lapse. New License is issued.		1	1	C
1.1	2	Provisional Licensing Files - Funeral Director or Embalmer	AC+1		AC+1	AC=Applicant becomes Licensed Funeral Director or Embalmer or is eliminated from Program		1	2	C
1.1	4	Licensing Files - Funeral Establishments – Funeral Homes, Commercial Embalming Facilities, Crematories, and Cemeteries	AC+1		AC+1	AC = License expired, terminated, revoked or closed. Archival review code removed subsequent to appraisal by the Archives and Information Services Division of the Library and Archives Commission. April 10, 1997		1	4	C
1.1	5	Complaints against Licensees	AC+1		AC+1	AC=Complaint Closed		1	5	C

Retention Codes (Field 7)

AC – After Closed, Terminated, Completed, Expired, Settled
 AV – Administrative Value

CE – Calendar Year End
 FE – Fiscal Year End
 LA – Life of Asset

MO – Months
 PM – Permanent
 US – Until Superseded

Archival Codes (Field 8)

A – Transfer to State Archives
 R – Review by State Archivist

Amendment Codes (Field 12)

N – New
 C – Changed
 D – Deleted



August 16, 2012

Ms. Amy Currier
Public Information Officer/Records Manager
Texas Funeral Service Commission
333 Guadalupe Street, Suite 2-110
Austin, TX 78701

Re: Texas Funeral Service Commission
9th Recertification, Amendment Number 1

Dear Ms. Currier:

Enclosed are approved amendment pages to your records retention schedule. Please maintain these pages with your currently approved schedule so that they can be easily referenced.

We appreciate your efforts in maintaining an up-to-date schedule. Making additions and changes to your schedule as you identify them not only ensures the integrity of your recordkeeping practices, but keeps your agency in compliance with state regulations (13 TAC §6.4) requiring the submission of any needed amendments to a retention schedule during its certification period to keep the information in the schedule current.

We will notify you of the date your schedule is due for recertification. Any additional approved amendments to your schedule, such as this one, should be incorporated into your main retention schedule prior to submitting it for recertification.

Thank you again for your commitment to complying with state records management laws and regulations. If we can provide any assistance to you, please call the information analyst assigned to your agency, Angela Ossar, at 512-463-6623.

Sincerely,

Craig Kelso
Director and State Records Administrator

Enclosure

cc: State Auditor, State Archivist
cc: (without enclosure) O.C. "Chet" Robbins

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Records Management

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Director and Librarian
Peggy D. Rudd

Assistant State Librarian
Edward Seidenberg

*Preserving yesterday,
informing today,
inspiring tomorrow.*

R01-513/513



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 513
Texas Funeral Service
Agency Name Commission

(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 Amy L. Currier
Name (Print or type) Amy L. Currier
Date July 24, 2012

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)

Not Required at This Time

Signature
Name (Print or type)
Date

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

Signature Peggy D. Rudd
Name (Print or type) Peggy D. Rudd
Date 8/13/12

Cert/Recert No. 9 Amendment No. 1

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 Amendment

SLR 122

Form SLR 105C must accompany this form.

1. Page 1 of 1

2. Agency Code	513	3. Agency Name	Texas Funeral Service Commission								
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4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. Current Schedule		12. Amend. Type
			Agency	Storage	Total			9. Remarks	Page No.	

1.1	2a	Pending Applicant Files	2		2						N
1.1.007	10	Administrative Correspondence	CE+4		CE+4	A			2	10	C
1.1.008	11	General Correspondence	AC+2		AC+2	AC=Purpose of record has been fulfilled			2	11	C

Retention Codes (Field 7)			Archival Codes (Field 8)			Amendment Codes (Field 12)		
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	MO – Months	A – Transfer to State Archives	N – New				
AV – Administrative Value	FE – Fiscal Year End	PM – Permanent	R – Review by State Archivist	C – Changed				
	LA – Life of Asset	US – Until Superseded		D – Deleted				



June 20, 2012

Ms. Amy Currier
Public Information Officer/Records Manager
Texas Funeral Service Commission
333 Guadalupe Street, Suite 2-110
Austin, TX 78701

RE: Texas Funeral Service Commission
Retention schedule approved for use.

Dear Ms. Currier:

Enclosed is a copy of your recertified records retention schedule. Please ensure all old copies of the schedule are superseded with this recertified copy.

Your recertified 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. We urge on you the importance of disposing of the records of your agency in a timely manner in accordance with the retention periods on your schedule. The destruction of any records of your agency not on your schedule requires special authorization from us.

During a certification period, state regulations (13 TAC §6.4) also require 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, contact the government information analyst assigned to your agency.

Your efforts in maintaining an up-to-date 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. Your schedule will be due for recertification on the last working day of June 2015. If you have any questions, call the information analyst assigned to your agency, Angela Ossar, at 512-463-6623.

Sincerely,

Craig Kelso
Director and State Records Administrator

Enclosure

cc: State Auditor, State Archivist
cc: (without enclosure) O.C. "Chet" Robbins

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Sally Reynolds

Director and Librarian
Peggy D. Rudd

Assistant State Librarian
Edward Seidenberg

*Making
information
work
for all
Texans*

R01-513/513



Texas
State Library
and Archives
Commission

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 513
Agency Name Texas Funeral Service
Commission

(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 *Amy L. Currier*

Name *(Print or type)* Amy L. Currier

Date February 9, 2012

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 *Peggy D. Rudd*

Name *(Print or type)* Peggy D. Rudd

Date 6/18/12

Cert/Recert No. 9 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

SLR 105

Form SLR 105C must accompany this form.

Page 1 of 8

2. Agency Code		3. Agency Name		7. Retention Period		8. Archival		10.	11.
513		Texas Funeral Service Commission							TSLAC ONLY
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	Agency	Storage	Total	9. Remarks		106 No.	Amend. No.
1.1	1	Individual Licensing Files - both Funeral Director and Embalmer or dual license	AC+4		AC + 4	AC = License expired, terminated, or revoked. Such Licenses may not be reissued after 1 year lapse. New License is issued.			2
1.1	2	Provisional Licensing Files - Funeral Director or Embalmer	AC+2		AC+2	AC=Applicant becomes Licensed Funeral Director or Embalmer or is eliminated from Program			2
1.1	3	List of Examinees	AV		AV				
1.1	4	Licensing Files - Funeral Establishments – Funeral Homes, Commercial Embalming Facilities, Crematories, and Cemeteries	AC+5		AC+5	AC = License expired, terminated, revoked or closed. Archival review code removed subsequent to appraisal by the Archives and Information Services Division of the Library and Archives Commission. April 10, 1997			2
1.1	5	Complaints against Licensees	AC+5		AC+5	AC=Complaint Closed			2
1.1	6	Examinations	US+1		US+1	Archival review code removed subsequent to appraisal by the Archives and Information Services Division of the Library and Archives Commission. April 10, 1997			

Retention Codes (Field 7)

AC – After Closed, Terminated, Completed, Expired, Settled
 AV – Administrative Value

CE – Calendar Year End
 FE – Fiscal Year End

LA – Life of Asset
 MO – Months

PM – Permanent
 US – Until Superseded

Archival Codes (Field 8)

A – Transfer to State Archives
 R – Review by State Archivist



STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

Page 2 of 8

2. Agency Code		513		3. Agency Name							Texas Funeral Service Commission		
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title			7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.		
					Agency	Storage	Total	9. Remarks					

1.1	7	Continuing Education Provider Applications & Supporting Documentation	AC		AC	AC = Expiration of Approved Course		
1.1.002	8	Audits	AC+7		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.		
1.1.004	9	Legislative Appropriations Requests	AC+6		AC+6	A AC = September 1 of odd-numbered calendar years. 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.		
1.1.007	10	Administrative Correspondence	CE+3		CE+3	A		1
1.1.008	11	General Correspondence	AC + 1		AC + 1		AC=Purpose of record has been fulfilled	1
1.1.014	12	Legal Opinions and Advice	AV		AV	A		
1.1.020	13	Public Information Requests-Not Exempted	AC+1		AC+1		AC= Date request fulfilled	

Retention Codes (Field 7)

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Archival Codes (Field 8)

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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

Page 3 of 8

2. Agency Code 513		3. Agency Name Texas Funeral Service Commission								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total					

1.1.021	14	Public Information Requests-Exempted	AC+2		AC+2		AC= Date of notification that records are exempt.		
1.1.023	15	Organizational Charts	US		US	A	Publication of charts in the strategic plans of the agency fulfills the archival requirement.		
1.1.026	16	Texas Register Submissions	AC+1		AC+1		AC=Date of publication in the Texas Register		
1.1.038	17	Customer Surveys	AC		AC	R	AC=Final Disposition of summary report.		
1.1.055	18	Strategic Plans	AC+6		AC+6	A	AC=Sept. 1 of odd numbered years. Archival requirement is met by sending required copies to TX State Publications Depository Program, TX State Library		
1.1.057	19	Transitory Information	AC + 1		AC + 1		AC=Purpose of record has been fulfilled		
1.1.058	20	Commission Meeting Agenda and Minutes	PM		PM	A			
1.1.060	21	Audio Tapes of Meetings	AC+90 days		AC+90 days		AC=Official approval of written minutes of the meeting. 90 days after board approval, tapes are destroyed		
1.1.062	22	Meetings-Supporting Documentation	2		2	A			

Retention Codes (Field 7)

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Archival Codes (Field 8)

A – Transfer to State Archives
 R – Review by State Archivist



STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

Page 4 of 8

2. Agency Code		513		3. Agency Name		Texas Funeral Service Commission			
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total				9. Remarks

1.1.064	23	Agency Performance Measures Documentation	FE+3		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.		
1.1.066	24	Reports, Biennial or Annual Agency (Narrative)	AC + 6		AC + 6 A	AC = September 1 of odd-numbered calendar years. The archival requirement is met by sending the required copies to the Texas State Publications Depository Program, Texas State Library and Archives Commission.		
1.1.068	25	Performance Measures, Performance & funds Management Reports	AC+6		AC+6	AC=Sept. 1 of odd-numbered calendar years		
1.2.005	26	Records Retention Schedule (SLR 105)	US		US			
1.2.010	27	Records Disposition Logs	AC+10 10		AC+10	AC = Records destroyed or transferred to the Archives and Information Services Division, Texas State Library.		

Retention Codes (Field 7)

AC – After Closed, Terminated, Completed, Expired, Settled
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Archival Codes (Field 8)

A – Transfer to State Archives
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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

Page 5 of 8

2. Agency Code		513		3. Agency Name		Texas Funeral Service Commission					
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.		
			Agency	Storage	Total						

1.3.001	28	State Publications	AC+2		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 § 441.101-441.106)		
3.1.001	29	Applications for Employment-Not Hired	CE+2		CE+2			
3.1.002	30	Applications for Employment-Hired	AC+5		AC+5	AC= Termination of Employment		
3.1.006	31	Employee Counseling Records	AC+5		AC+5	AC= Termination of counseling		
3.1.019	32	Performance Appraisals	2		2	Comments: 29 CFR 1620.32(c)		
3.1.020	33	Personnel Corrective Action Documentation	AC+5		AC+5	AC= Termination of Employment		
3.1.021	34	Personnel Disciplinary Action Documentation	AC+5		AC+5	AC= Termination of Employment		
3.1.022	35	Personnel Information or Action Forms	AC+5		AC+5	AC = Termination of Employment 29 CFR 1602.31		
3.1.023	36	Position/Job Descriptions	AC+5		AC+5	AC = Until superseded or job eliminated. 40 TAC 815.106(i).		
3.1.026	37	Criminal History Checks	AC		AC	AC=The criminal history record has served the immediate purpose for which it was obtained.		

Retention Codes (Field 7)

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Archival Codes (Field 8)

A – Transfer to State Archives
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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

Page 6 of 8

2. Agency Code 513		3. Agency Name Texas Funeral Service Commission						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival 9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total			

3.1.029	38	Employment Eligibility (INS I-9)	AC+5		AC+5	AC = Termination of employment. 8 CFR 274a.2 (b) (2) (i) (A) and (c) (2).		
3.1.031	39	Employee Benefits – Other than Insurance	AC+5		AC+5	AC = Until superseded or termination of employment.		
3.1.037	40	Employee Recognition Records	AC+5		AC+5	AC=Termination of employment		
3.2.001	41	Employee Deduction Authorizations	AC+5		AC+5	AC=After termination of employee or after amendment, expiration, or termination of authorization, whichever is sooner.		
3.2.002	42	Employee Earnings Records	AC+5		AC+5	AC=Termination of employment 40 TAC 815.106 (i)		
3.2.003	43	Federal Tax Records	AC+4		AC+4	AC=Tax due date, date claim is filed, or date tax is paid, whichever is later. 26 CFR 31.6001-1 (e)(2)		
3.2.005	44	W-4 Forms	AC+5		AC+5	AC=Termination of employment 26 CFR 31.6001-1(e)(2)		
3.2.008	45	Direct Deposit Application/Authorizations	US		US			
3.2.009	46	State Deferred Compensation	AC+5		AC+5	AC = All accounts with a vendor or vendors for the individual participant have been closed		

Retention Codes (Field 7)

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Records Retention Schedule

SLR 105

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Page 7 of 8

2. Agency Code 513		3. Agency Name Texas Funeral Service Commission						
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			Agency	Storage	Total			

3.2.010	47	HRIS Reports & Documentation	AC+4		AC+4		AC= After Closed, Terminated, Completed, Expired, Settled		
3.3.011	48	Former Employee Verification Records (SSN, Name, date of empl. Position, last known address)	AC+75		AC+75		AC = Termination of employment		
3.3.024	49	Personnel Policies and Procedures	US+3		US+3	A			
3.3.031	50	EEO Reports and Supporting Documentation	FE+3		FE+33		29 CFR 1602.30, 1602.32, 1602.39, 1602.41, 1602.48, 1602.50		
3.4.002	51	Leave Status Reports	FE + 3		FE + 3				
3.4.004	52	Overtime Authorizations	4		4				
3.4.006	53	Time Cards & Time Sheets	4		4		Comments: 40 TAC 815.106(i).		
3.4.007	54	Time Off and/or Sick Leave Requests	FE+3		FE+3				
4.1.001	55	Accounts Payable Information	FE+3		FE+3				
4.1.003	56	Canceled Checks/Stubs/Warrants/Drafts	FE+3		FE+3				
4.1.004	57	Encumbrance detail	FE+3		FE+3				
4.2.001	58	Cash Deposit Vouchers	FE+3		FE+3				
4.2.002	59	Cash receipts	FE+3		FE+3				
4.2.005	60	Purchase Vouchers	FE+3		FE+3				
4.2.006	61	General Journal Vouchers	FE+3		FE+3				
4.2.007	62	Expenditure Vouchers	FE+3		FE+3				
4.3.003	63	Expenditures Journals or Registers	FE+3		FE+3				

Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
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Records Retention Schedule

SLR 105

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Page 8 of 8

2. Agency Code 513		3. Agency Name Texas Funeral Service Commission							
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			Agency	Storage	Total				

4.5.001	64	Worksheets for Preparing Fiscal Reports	FE + 3		FE + 3				
4.5.002	65	Internal Fiscal Management Reports	FE + 3		FE + 3				
4.5.003	66	Annual Financial Reports	AC+6		AC+6	A	AC= September 1 of odd-numbered calendar years. Archival requirement is met by sending the required copies to the Publications Depository Program, TX. State Library		
4.5.006	67	Annual Operating Budgets	FE+3		FE+3		Required by General Appropriations Act		
4.6.002	68	Reconciliations	FE+3		FE+3				
4.7.003	69	Return Checks/Warrants/Drafts	AC+3		AC+3		AC=After deemed uncollectable		
4.7.004	70	Capital Asset Records	LA + 3		LA + 3				
5.2.014	71	Inventory – Annual Physical	FE+3		FE+3				

Retention Codes (Field 7)

AC – After Closed, Terminated, Completed, Expired, Settled
 AV – Administrative Value

CE – Calendar Year End
 FE – Fiscal Year End

LA – Life of Asset
 MO – Months

PM – Permanent
 US – Until Superseded

Archival Codes (Field 8)

A – Transfer to State Archives
 R – Review by State Archivist