

February 5, 2020



Todd Chenoweth  
General Counsel  
Texas Water Development Board  
1700 N Congress Ave #630  
Austin, TX 78701

Dear Mr. Chenoweth,

Your agency's records retention schedule is approved for use as of **2/3/2020**, and may be accessed on our website at <https://www.tsl.texas.gov/slrn/state/schedules>. Please ensure that all old copies of the schedule are superseded with this certified copy.

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

Each agency schedule must be reviewed, updated and submitted for recertification annually for the first two years after the initial approval of the schedule and every five years thereafter. The deadline for submission of your schedule for its next recertification is the last working day of **February 2025**.

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

Erica Siegrist  
(512) 463-6623  
[esiegrist@tsl.texas.gov](mailto:esiegrist@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 blue ink, appearing to read "Craig Kelso".

Craig Kelso  
Director and State Records Administrator

cc: Agency Head

Lorenzo de Zavala  
State Archives and  
Library Building

1201 Brazos Street  
Austin, Texas  
78701

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

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

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*Assistant State Librarian*  
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**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 580
Agency Name Texas Water Development 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 [Handwritten Signature]
Name (Print or type) Todd Chenoweth
Date 7/31/2018

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 [Handwritten Signature]
Name (Print or type) Gloria Meraz
Date 2/3/2020

Cert/Recert No. 8 Amendment No. --

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## 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  
Rev. 2017-07

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)

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 R/O – Review by State/University Archivist

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					Years	Months	Days				
AW-001	1.1.007	Correspondence - Administrative	Incoming/outgoing and internal correspondence, in any format pertaining to the formulation, planning, availability, implementation, interpretation, modification, or redefinition of the programs, services, or projects and the federal, state, and local administrative regulations, policies, and procedures that govern them. Includes Texas Water Development (TWDB) Executive Mail Log.	4					R	ARCHIVES NOTE: Only the administrative correspondence of executive staff, board or commission members, division directors and program heads require archival review. Contact the State Archives when these records have met their retention periods. CAUTION: This records series and item number 1.1.008 should be used only for correspondence that is not included in or directly related to another records series on the agency's approved schedule. For example, a memorandum that documents an appropriations request must be retained for the minimum retention period prescribed by item number 1.1.004; a letter concerning an audit for that prescribed by item number 1.1.002, etc. SEE ALSO item number 1.1.011.	



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AW-002	1.1.008	Correspondence - General	Incoming /outgoing and internal nonadministrative and internal correspondence pertaining to or arising from the routine operations of the policies, programs, services, or projects.		2					SEE comment to Item #1.1.007. SEE ALSO: Item #1.1.010.	
AW-003	1.1.010	Directives	Any document that officially initiates, rescinds, or amends general office procedures of the TWDB.	US	1						
AW-004	1.1.011	Executive Orders	Any document that initiates, rescinds, or amends a regulation, policy, or procedure that governs the TWDB programs, services, or projects.	US	3				A		



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AW-005	1.1.013	Calendars, Appointment and Itinerary Records	Calendars, appointment books or programs, and scheduling or itinerary records, in any media, purchased with state funds or maintained by staff during business hours that document appointments, itineraries and other activities of the agency officials or employees.	CE	1				R	ARCHIVES NOTE: Only the calendars, appointment, and itinerary records of elected officials, executive staff, board or commission members, division directors, and program heads require archival review. Contact the State Archives when these records have met their retention periods. CAUTION: A record of this type purchased with personal funds, but used by a state official or employee to document his or her work activities may be a state record and subject to this retention period. See Open Records Decision 635 issued in December 1995 by the Attorney General.	



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AW-006	1.1.024	Plans and Planning Records	Plans and records relating to the process of planning new or redefined programs, services or projects of an agency that are not included in or directly related to other records series in this schedule. Includes Facility Needs Records.	AC	3			AC = Decision made to implement or not to implement as a result of the planning process	R	ARCHIVES NOTE: Data processing planning records are not archival.	
AW-007	1.1.043	Training Materials	Instructional materials developed by the agency for training entities or individuals it serves.	US	1						



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AW-008	1.1.057	Transitory Information	A record of temporary usefulness that is not an integral part of the TWDB records series, that is not regularly filed within an agency's recordkeeping system, and is required only for a limited period of time for the completion of an action by an official or employee of the TWDB 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 an agency's functions. Some examples of transitory information, which can be in any medium (voice mail, fax, email, social media, hard copy, telephone message notifications etc.) are routine messages; internal meeting notices; routing slips; incoming letters or memoranda of transmittal that add nothing of substance to enclosures; and similar routine information used for communication, but not for the documentation, of a specific agency transaction..	AC				AC = Purpose of record has been fulfilled.		CAUTION: Records management officers should use caution in assigning this records series item number to records of an agency to make certain they are not part of another records series listed in this schedule or, for records series unique to an agency, are not part of a records series that documents the fulfillment of the statutory obligations of the agency or the documentation of its functions. The disposal of transitory information need not be documented through destruction authorizations (1.2.001) or in records disposition logs (1.2.010) but agency should establish procedures governing disposal of these records as part of its management plan (1.2.014).	



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AW-010	1.1.058	Meeting Agenda, Minutes, and Resolutions	Official agenda, minutes, and resolutions of the Texas Water Development Board, Texas Water Resource Finance Authority, Work Sessions, Water Conservation Advisory Council, and any other open meetings as required by Government Code, Chapter 551.	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 (TSLAC). CAUTION: This records series and item numbers 1.1.059, 1.1.060, 1.1.061, and 1.1.062 must be used for those state boards, committees, commissions, and councils, which by law or the biennial Appropriations Act, are administered by another state agency. These records and all others related to the functions of any of these dependent entities must be included in the records retention schedule of the administering agency.	



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AW-011	1.1.062	Meetings - Supporting Documentation	Texas Water Development Board, Texas Water Resource Finance Authority, Work Sessions, Water Conservation Advisory Council, Finance Committee, and any other open meetings as required by Government Code, Chapter 551		2				A	See caution comment at item number 1.1.058 Review for client-attorney privilege before sending to Archives.	
AW-012	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.			
AW-013	1.1.063	Staff Meeting Minutes and Notes	Minutes or notes taken and supporting documentation used at an internal agency staff meeting.		1						
AW-014	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.	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.	



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AW-015	1.1.065	Reports and Studies (Non-Fiscal)-Raw Data	Information or data collected and compiled for producing non-fiscal reports.	AV						CAUTION: Does not include source documentation used for information or data included in or directly related to another records series In this schedule. SEE especially Item number 1.1.064.	
AW-016	1.1.067	Reports and Studies (Non-Fiscal)	Annual, sub-annual or special reports or studies on non-fiscal aspects of an agency's programs, services, or projects compiled by agency personnel, by advisory committees, or by consultants under contract with an agency that are not noted elsewhere in the schedule. Includes reports distributed either internally or to other entities.		3				R	ARCHIVES NOTE: For agencies that have had an archival appraisal, separate this records series by each type of archival coding, A, R, or E. SEE Schedule Introduction for more information.	
AW-017	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 contracts, and similar activities.		1					CAUTION: SEE item number 1.1.064.	



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AW-018	1.1.070	Rules, Policies, and Procedures – Final and Working Files	Manuals, guidelines, administrative rules, or similar records distributed internally for the use of employees or externally to the public or those individuals or entities regulated by an agency that sets out the rules, policies, and procedures that govern the agency's programs, services or projects and working files used in their development.	AC	3			AC = Completion or termination of program, rules, policies or procedures.	R	SEE ALSO Agency Rules, Policies and Procedures - Working Files, 1.1.071.	
AW-019	1.2.003	Forms History File	Print masters of original version and all subsequent revisions to an agency form, including any associated design or design modification requests.	AC	1			AC = Discontinuance of use of form.			
AW-020	1.2.004	Forms Inventory	Any periodic listing of all forms used internally or externally by an agency.	US							



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AW-021	1.3.001	State Publications and Published Technical Papers	One copy of each TWDB publication or published technical paper as defined in the introduction of this schedule, 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, item numbers 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 and published technical papers 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. 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).	



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					Years	Months	Days				
AW-022	1.3.002	Publication and Technical Paper Development Files	Background material, copy (drafts), original artwork, photo negatives, prints, flats, etc. This includes all work performed both inside and outside the agency.	AV					R		
AW-023	2.1.002	Master Files - Electronic	Relatively long-lived computer files containing organized and consistent sets of complete and accurate electronic records. Examples include, but are not limited to, data tables of relational databases used by applications or computer programs.	AC				AC = Completion of 3rd verification cycle, or audit completion confirming successful transaction updates, or required audit trail maintenance, or the ability to restore or migrate when errors are detected or when hardware or software changes occur.		CAUTION: Records management officers must be certain before assigning the retention period of AC to agency automated processing files that the files do not fall under records series listed elsewhere.	
AW-024	5.1.014	Office Procedures - TWDB	Any internally distributed manual, guidelines, or similar records that establish standard office procedures for the agency; for example, agency style manuals, telephone protocols, mail room procedures, print shop and photocopy ordering instructions.	US	1					Includes out of office notifications, mail distribution, etc.	
AW-025	5.2.010	Equipment Manuals		LA							



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AW-027	5.1.015	Correspondence Tracking Records	Any record created by an agency to track any type of incoming and outgoing correspondence or packages by the U.S. Postal Service or by private couriers. Also known as a mail log.		1						
AW-028	5.4.011	Visitor Control Registers	Logs, registers, or similar records documenting visitors. Includes internal and external training registration logs.		3						
AW-029	4.7.008	Grant Records	This series documents state and federal grant projects participated in or administered by state agencies. It includes grant authorization records, which provide evidence of the award of grants to or by agencies; grant/project financial or performance reports, which are periodic reports of financial activity and/or program performance related to grants received or made by agencies.	AC	3			AC = Satisfaction of all Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments (the Common Rule).		CAUTION: Retention requirements may vary depending on the specific federal funding agency. Agencies must ensure that records are retained for the appropriate retention period.	



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AW-030	1.1.006	Complaint records	Complaints received by an agency from the public concerning the agency and records pertaining to the resolution of the complaint.	AC	3			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	
AW-031	1.1.040	Speeches, Papers and Presentations	Notes or text 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		
AW-538	5.4.010	Material Safety Data Sheets (MSDS)		AC				AC = After sheets are updated or hazardous chemical no longer stored by agency, as applicable.			
FIN-601	4.7.010	Bond Counsel (Contracts, Bond Sales & Related Information)	Services performed for TWDB relating to bond activity.	AC	7			AC = Retirement of debt.			
FIN-602	2.2.011	Batch Data Entry Control Records	Forms and logs used to reconcile batches submitted for processing against batches received and processed (includes document logs).	FE	6						
FIN-603	2.2.012	Output Records for Computer Production	Reports showing transactions that were accepted, rejected, suspended, and/or processed.	AV							



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FIN-604	3.1.031	Employee Benefits - Other than Insurance	Agency copies of information relating to the selection of available benefit options other than insurance.	AC	2			AC = Until superseded or termination of employment.		CAUTION: Documents that serve as payroll deduction authorizations must be maintained for the retention period prescribed for item number 3.2.001.	
FIN-605	3.2.001	Employee Deduction Authorizations	Documentation used to start, modify, or stop all voluntary or required deductions from payroll, including garnishment or other court ordered attachments.	AC	4			AC = After termination of employee or after amendment, expiration, or termination of authorization, whichever sooner.			
FIN-606	3.2.002	Employee Earnings Records			4					Electronic	40 TAC 815.106 (i)
FIN-607	3.2.003	Federal Tax Records	Payroll: FICA records (W2s); Tax Withholding (W9's); IRS - Quarterly, 941, etc.	AC	4			AC = Tax due date, date the claim is filed, or date tax is paid whichever is later.		Federal requirement is 3 years from the date of the submission of the final Financial Status Report. Files must be reviewed by staff before final disposition.	26 CFR 31.6001-1(e)(2) (40 CFR 31.42(c)(1) 40 TAC 815.106 (i)



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FIN-611	3.2.009	State Deferred Compensation Records		AC	5			AC = All accounts with a vendor or vendors for the individual participant have been closed.		For instructions regarding the determination of the closure of accounts and for additional information regarding the retention period see the most current edition of the Benefits Coordinator Reference Manual issued by the Employees Retirement System of Texas.	
FIN-613	3.3.010	Bureau of Labor Statistics Reports			3						
FIN-614	3.3.023	Reimbursable Activities, Requests and Authorizations to Engage in	Requests and authorizations for travel; participation in educational programs, workshops, or college classes; or for other work-related activities for which the expenses of the employee are defrayed or reimbursed.	FE	3						



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FIN-618	4.1.001	Accounts Payable Information	Includes payment logs and charge or bill statements received by agencies from the state agencies.	FE	3					Federal requirement is 3 years from the date of the submission of the final Financial Status Report. Files must be reviewed by staff before final disposition.	40 CFR 31.42(c)(1)
FIN-620	4.2.002	Cash Receipts, Fee Receipts	Includes receipts for fees.	FE	3					Federal requirement is 3 years from the date of the submission of the final Financial Status Report. Files must be reviewed by staff before final disposition.	40 CFR 31.42(c)(1)
FIN-621	4.2.005	Purchase Vouchers	Requisitions, orders, receiving reports, invoices, or statements, change orders, best value determinations, etc.	FE	3					Federal requirement is 3 years from the date of the submission of the final Financial Status Report. Files must be reviewed by staff before final disposition.	40 CFR 31.42(c)(1)



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FIN-622	4.2.006	General Journal Vouchers		FE	3					Federal requirement is 3 years from the date of the submission of the final Financial Status Report. Files must be reviewed by staff before final disposition.	40 CFR 31.42(c)(1)
FIN-623	4.2.007	Expenditure Vouchers		FE	3					Federal requirement is 3 years from the date of the submission of the final Financial Status Report. Files must be reviewed by staff before final disposition.	40 CFR 31.42(c)(1)
FIN-624	4.4.001	General and Subsidiary Ledgers		FE	3						
FIN-625	4.4.002	Accounts Receivable Ledgers		FE	3						
FIN-626	4.4.003	Accounts Payable Ledgers		FE	3						
FIN-627	4.5.001	Worksheets for Preparing Fiscal Reports		FE	3						
FIN-628	4.5.002	Internal Fiscal Management Reports		FE	3						



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FIN-629	4.5.003	Annual Financial Reports	Required by the General Appropriations Act.	AC	6			AC = September 1 of odd-numbered calendar years.		CAUTION: If an agency does not produce a biennial or annual narrative report as described in item number 1.1.066, then these annual financial reports must be marked with Archival Code A. The archival requirement, when a biennial or annual narrative report 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.	
FIN-630	4.5.005	External Fiscal Reports	Special purpose – i.e. federal financial reports, salary reports, external audits, etc.	FE	3					Federal requirement is 3 years from the date of the submission of the final Financial Status Report. Files must be reviewed by staff before final disposition.	40 CFR 31.42(c)(1)
FIN-631	4.5.006	Annual Operating Budgets	Required by the General Appropriations Act.	FE	3						



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FIN-632	4.5.007	USAS Reports - Daily		AC				AC = Receipt and reconciliation of monthly report.			
FIN-633	4.5.009	USAS Reports - Annual		FE	3						
FIN-634	4.6.002	Reconciliations		FE	3						
FIN-635	4.6.003	Cash Counts	Includes Texas Natural Resources Information System (TNRIS) Petty Cash Audits.	FE	3						
FIN-636	4.7.002	Bank Statements and Transfer Documents		FE	3						
FIN-640	4.7.010	TWRFA - Texas Water Resource Finance Authority		AC	4			AC = Life of debt including bonds.			
FIN-642	4.7.012	Finance Signature Authorizations	Signature cards or similar records establishing authority of an agency employee to initiate or authorize financial transactions on behalf of an agency.	AC	3			AC = Until Superseded at the Fiscal Year End.			
FIN-645	5.5.001	Billing Detail - Telecommunications (Other Than TEX-AN)		FE	3					SEE item number 5.5.006 for TEX-AN billing detail.	



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FIN-646	5.5.006	Billing Detail - Telecommunications (TEX-AN)		FE	3					The billing agency will maintain all long distance TEX-AN records and will provide each using agency its bill summary of centralized capitol complex telephone service without call detail records. For these bill summaries, SEE item number 4.7.011. SEE item number 5.5.001 for billing detail from carriers other than TEX-AN.	
FIN-647	4.7.010	TWDB Bonds	Bearer Bonds	PM							
FIN-648	4.7	Annual Arbitrage Rebate Liability Calculation Report	Arbitrage calculation documents related to IRS compliance. Bonds: Arbitrage Reports.	AC	3			AC= Final maturity payment of the associated bonds.			
FIN-701	1.1	Master Financial Files – Retired Loans		AC	4			AC = Life of loan or life of bond source series, whichever is greater.	A	SEE: File plan in room 630 for a complete list of documents contained in this record series.	



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FIN-707	1.1	Transcripts of Legal Proceedings, Bond Transcript, Ordinance, Resolution, Agreements.	Legal and executed document pertaining to respective bonds issued by a borrower and held by the TWDB.	AC	4			AC = Life of loan or life of bond source series, whichever is greater.	R	Records maintained in File Room 630	
GR-201	1.1.004	Legislative Appropriation Requests	Including any supporting documentation created and/or used to justify and support legislative appropriations requests by an agency.	AC	6			AC = September 1 of odd-numbered calendar years.	A	ARCHIVES NOTE: The archival requirement is met by sending the required copies of the requests to the Texas State Publications Depository Program, Texas State Library and Archives Commission. Only copies of supporting documentation submitted to the Legislative Budget Board are archival.	
GR-202	1.1.027	Proposed Legislation	Draft legislation, fiscal notes, bill analyses and related correspondence.	AV							
GR-203	1.1.074	Sunset Review Report & Documentation		AC	3			AC = After the subsequent Sunset Review.	R		



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GR-401	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 required by statute.	AC	6			AC = September 1 of odd-numbered calendar years.	A	ARCHIVES NOTE: The archival requirement is met by sending the required copies of the reports to the Texas State Publications Depository Program, Texas State Library and Archives Commission.	
GR-403	1.1.055	Strategic Plans	Information resources and operational strategic plans prepared in accordance with 2054.095 and 2056.002, Government Code.	AC	6			AC = September 1 of odd-numbered calendar years.	A	ARCHIVES NOTE: The archival requirement is met by sending the required copies of the plans to the Texas State Publications Depository Program, Texas State Library and Archives Commission.	
GR-404	1.1.038	Customer Surveys		AC				AC = Final disposition of summary report.			
GR-406	1.1.023	Organization Chart		US	5				A		



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GR-C-405	1.3.002	Publication Development Files	Background material, copy (drafts), original artwork, photo negatives, prints, flats, artwork for social media and other social media development files, etc. This includes all work performed both inside and outside the agency.	AV					R		
GR-C-407	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. Also includes files for conference outreach.		2				R		
GR-C-408	1.1	Design Marks, Trademarks	Logos for various TWDB-associated programs	PM							
IA-101	1.1.002	Audits	Audits and reviews performed by or on behalf of an agency, including the working papers that support the audit. Also includes audits performed on the agency.	AC	7			AC = Publication or release of final audit findings.		The State Auditor's Office retains any copies of its audits performed on Texas state agencies.	



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O&A-CP-402a	5.3.007	Bid Documentation	Includes bid requisitions & authorizations, invitations to bid or propose, bid specifications, accepted and rejected bids, bid tabulation & evaluations. a) Associated with a contract executed, renewed, or amended on or after September 1, 2015.	AC	7			AC=Expiration or termination of the instrument according to its terms or decision not to proceed with the bid.		CAUTION: If a formal written contract is the result of a successful bid or request for proposal, the successful bid or request for proposal and its supporting documentation must be retained for the same period as the contract. SEE item number 5.1.001.	
O&A-CP-402b	5.3.007	Bid Documentation	Includes bid requisitions & authorizations, invitations to bid or propose, bid specifications, accepted and rejected bids, bid tabulation & evaluations. b) Associated with a contract executed, renewed, or amended on or before August 31, 2015.	FE	3					CAUTION: If a formal written contract is the result of a successful bid or request for proposal, the successful bid or request for proposal and its supporting documentation must be retained for the same period as the contract. SEE item number 5.1.001.	



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O&A-CP-402c	5.3.007	Bid Documentation	Includes bid requisitions & authorizations, invitations to bid or propose, bid specifications, accepted and rejected bids, bid tabulation & evaluations. c) Unsuccessful bids that do not meet agency submission requirements and are not included in bid evaluation process (e.g. withdrawn, missed submission deadline, incomplete submission, etc.).	AC	2			AC=Date of notification of denial or date of withdrawal, as applicable.		CAUTION: If a formal written contract is the result of a successful bid or request for proposal, the successful bid or request for proposal and its supporting documentation must be retained for the same period as the contract. SEE item number 5.1.001.	



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O&A-CP-417a	5.1.001	Contracts and Leases	Agency's contracts, leases, and agreements include general obligation, land lease, utilities, and construction except for buildings. Documents include specifications, affidavits of publication of calls for bids, accepted bids, performance bonds, contracts, purchase orders, inspection reports, and correspondence. Includes Research and Planning Fund Contracts. a) Executed, renewed or amended on or after September 1, 2015	AC	7			AC = Expiration or termination of the instrument according to its terms.		SEE related item numbers 3.1.035 Performance Bonds and 5.3.007 Bid Documentation. SEE item number 5.2.028 for building construction contracts and item number 5.1.017 for contract logs.	Government Code, 441.1855



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O&A-CP-417b	5.1.001	Contracts and Leases	Agency's contracts, leases, and agreements include general obligation, land lease, utilities, and construction except for buildings. Documents include specifications, affidavits of publication of calls for bids, accepted bids, performance bonds, contracts, purchase orders, inspection reports, and correspondence. Includes Research and Planning Fund Contracts. b) Executed, renewed or amended on or before August 31, 2015	AC	4			AC = Expiration or termination of the instrument according to its terms.		SEE related item numbers 3.1.035 Performance Bonds and 5.3.007 Bid Documentation. SEE item number 5.2.028 for building construction contracts and item number 5.1.017 for contract logs.	Government Code, 441.1855
O&A-CP-619	4.1.005	Inventory and Other Cost Files	Production, job, labor, quotes, pricing, specifications, etc.	FE	3						
O&A-CP-637	4.7.004	Capital Asset Records		LA	3						
O&A-CP-643	5.3.008	Purchasing Logs	Log, register, etc., providing a record of purchase orders issued, orders received, and similar data on procurement status.	FE	3						



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O&A-CP-644	5.3.009	Requests for Information	Requests for information preliminary to the procurement of goods or services by direct purchase or bid.	AC				AC = Decision not to proceed with the procurement.			
O&A-CR-415	1.2.013	Records Control Locator Aids	Includes indexes, card files, shelf lists, registers, guides, etc.	AC				AC = When control aid is updated, revised, or no longer needed.		CAUTION: These records must carry the same retention period and archival code of the records they support.	
O&A-HR-501	1.1.056	ADA (Americans with Disabilities Act) Documentation	Self-evaluation and plans documenting compliance with the requirements of the Americans with Disabilities Act. Includes Accessibility Coordination Group.		3						28 CFR 35.105 (c).
O&A-HR-503	3.1.001	Applications for Employment - Not Hired	Applications, resumes, transcripts, letters of reference, and similar documents whose submission by candidates for vacant positions is required on the application form, by application procedures, or in the employment advertisement.		2						29 CFR 1602.31.



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O&A-HR-504	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.			
O&A-HR-505	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.			
O&A-HR-506	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.			



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O&A-HR-507	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
O&A-HR-508	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, pre-employment drug screening test results, polygraph examination results, and all other records that document the selection process.		2					CAUTION: Does not include criminal history checks. SEE item number 3.1.026.	29 CFR 1602.31
O&A-HR-509	3.1.018	Grievance Records	Records relating to the review of employee grievances against personnel policies, working conditions, etc.	AC	2			AC = Final decision on the grievance.		CAUTION: Does not include formal complaints filed by an agency employee with the Equal Employment Office (EEO) of the U. S. Department of Labor. SEE item number 1.1.048.	
O&A-HR-510	3.1.019	Performance Appraisals			2						29 CFR 1620.32(c).



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O&A-HR-511	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 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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O&A-HR-512	3.1.021	Personnel Disciplinary Action Documentation	Disciplinary actions are those actions, which may affect pay, status, or tenure. They are imposed to discipline an employee whose conduct is harmful to the best interests of the state, the agency, or the employee work force, and for failure to improve performance or conduct following imposition of corrective action. May include cause for demotion, suspension, or dismissal, and the reasons for failure to give written notice of resignation. May also be used to document evidence of employee self-improvement efforts, as well as favorable and unfavorable communication.	AC	5			AC = Termination of employment.			



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O&A-HR-513	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. Includes Income Adjustment Authorizations used to make increases or decreases to an employees' gross pay, FICA, retirement, or in the computation of taxes.	AC	2						29 CFR 1602.31
O&A-HR-514	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).



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O&A-HR-515	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.	
O&A-HR-516	3.1.027	Training and Educational Achievement Records (Individual)	Certificates of completion, transcripts, test scores, or similar records documenting the training, testing, or continuing education achievements of an employee.	AC	5			AC = Termination of employment.			



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O&A-HR-517	3.1.029	Employment Eligibility, Documentation or Verification of	Federal reporting form (INS I-9).	AC	1			AC = Termination of employment.		CAUTION: Federal regulation requires that INS I-9 forms be retained for 3 years from date of hire or 1 year after separation of the employee, whichever later. Agencies should make certain that the INS I-9 forms for employees who terminate from an agency less than 3 years from date of hire are kept for the 3-year retention period.	8 CFR 274a.2(b)(2)(i)(A) and (c)(2).
O&A-HR-518	3.1.037	Employee Recognition Records	Awards, incentives, tenure, etc.	AC	5			AC = Termination of employment.			
O&A-HR-519	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							



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O&A-HR-520	3.1.039	Ombudsman Records	Consultation records, notes, letters, memos, emails, reports and other documentation.	AC				AC = Final decision or matter closed.		CAUTION: Does not include formal complaint filed with EEO. If matter becomes a grievance or the subject of counseling or litigation, or employee is subject to disciplinary action, the records are subject to retention in the appropriate records series. SEE 1.1.048, 3.1.006, 3.1.018, 3.1.020, and 3.1.021.	
O&A-HR-521	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.
O&A-HR-522	3.3.004	Benefit Plans		US	1						29 CFR 1627.3 (b) (2)
O&A-HR-523	3.3.010	Labor Statistics Reports	Reports providing statistical information on labor force.		3						



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O&A-HR-524	3.3.011	Former Employee Verification Records	Minimum information needed to verify employment, includes name, social security number, exact dates of employment, last known address and most recent public access option form.	AC	75			AC = Termination of employment.		SEE item number 3.1.038.	
O&A-HR-525	3.3.015	Positions/Job Classification Review File	Records relating to review and monitoring of job classifications within an agency.	US	3						
O&A-HR-526	3.3.020	Work Schedules / Assignments	Work, duty, shift, crew, or case schedules, rosters, or assignments.		1						
O&A-HR-527	3.3.022	Texas Workforce Commission (TWC) Reports	Reports to the agency from TWC or its predecessor pertaining to employees.		3						
O&A-HR-528	3.3.024	Personnel Policies and Procedures	Any internally distributed manuals, guidelines, or similar records that define agency wide policies and procedures concerning the personnel of an agency.	US	3						
O&A-HR-529	3.3.025	Job Procedure Records	Any documents detailing the procedural duties and responsibilities of agency positions on a position-by-position basis.	US	3						



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O&A-HR-530	3.3.026	Agency Staffing Reports	Any reports compiled by an agency on aspects of personnel staffing, including listings of all staff by program or name, staff hired during a month, detailed listings of employees within its organizational structure, position vacancies, analyses of turnover rates and seasonality of employment, etc.	US	3						
O&A-HR-531	3.3.027	Aptitude and Skills Test	Aptitude or skills tests required of job applicants or of current personnel to qualify for promotion or transfer.	US	2					CAUTION: One copy of each different test (different in terms of either questions or administration procedures) should be retained for the period indicated.	29 CFR 1602.31
O&A-HR-532	3.3.028	Aptitude and Skills Tests (Test Papers)	Aptitude and skills test papers of job applicants or of current personnel taking a test to qualify for promotion or transfer.		2						29 CFR 1602.31
O&A-HR-533	3.3.029	Aptitude and Skills Tests (Validation Records)	Records of the validation of aptitude and skills tests.	AC	2			AC = As long as the test is used by an agency.			29 CFR 1602.31



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O&A-HR-534	3.3.030	Training Administration Records	Instructional materials and other records associated with in-house training of agency personnel on personnel policies and procedures and other policies and procedures that govern an agency's programs, services, or projects.	US	2					CAUTION: Does not include hazardous material training records. SEE item number 5.4.007.	
O&A-HR-535	3.3.031	EEO Reports and Supporting Documentation	Includes documentation used to complete EEO reports.		3						229 CFR 1602.32, 1602.39, 1602.41, 1602.48, and 1602.50.
O&A-HR-536	3.3.032	Equal Pay Records	Reports, studies, aggregated or summary data, and similar documentation compiled to monitor and demonstrate compliance with the federal Equal Pay Act.		3						29 CFR 1620.32
O&A-HR-537	5.4.001	Accident Reports and Associated Documentation	Accident or occupational disease reports (by supervisors and employees) and other associated reports required to be submitted to the Texas Department of Insurance or its predecessors or maintained internally on accident frequency.	CE	5					The Texas Department of Insurance retains copies of the reports submitted to it for 50 years.	29 CFR 1904.33.



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O&A-HR-539	5.6.004	License and Driving Record Checks		AC				AC = Until superseded or until termination of employment.			
O&A-HR-540	3.2.010	Human Resources Information System (HRIS) Reports	Includes supporting documentation.	AC	4			AC = Until superseded by new report.			
O&A-HR-541	3.4.008	Special Leave	Sick leave pool documentation, requests submitted, approvals, number of hours transferred in and out, emergency leave, military leave, FMLA, extended sick leave	FE	3						
O&A-HR-542	3.2.005	W-4 Forms	"Employee's Withholding Exemption Certificate" maintained by the TWDB.	AC	4			AC = Until superseded, obsolete, or upon separation of employee.			26 CFR 31.6001-1 (e)(2)
O&A-HR-543	3.2.008	Direct Deposit Application/Authorizations		US							
O&A-HR-544	3.1.034	Resumes – Unsolicited	Retention period applies if an agency replies to the sender of a resume that it will be kept on file should future job openings occur.	AV						SEE item number 3.1.014 for resumes, whether solicited or unsolicited, that are used in any way in the employment selection process.	



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O&A-HR-616	3.4.006	Time Cards and Time Sheets	Includes overtime authorizations, time off, and sick leave requests	AC	4						40 TAC 815.106(i).
O&A-IT-424	5.4.012	Security Access Records	Includes Employee System Access records.	AC	2			AC = Until superseded, date of expiration, or date of termination, whichever sooner.			
O&A-IT-806	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.



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O&A-IT-807	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 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 retained for the time required to access the records.	13 TAC 6.94.



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O&A-IT-808	2.1.009	Technical Documentation	Records adequate to specify all technical characteristics necessary for reading or processing of electronic records and their timely, authorized disposition including documentation describing how a system operates and necessary for using the system such as user guides, system or sub-system definitions, system specifications, input and output specifications, and system flow charts, 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 or software environment with new documentation or there are no electronic records being retained to meet an approved retention period that require the documentation to be retrieved and read.		CAUTION: Software needed for access to electronic records must be retained for the time period required to access the records.	13 TAC 6.94.



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O&A-IT-815	5.4.013	Disaster Preparedness and Recovery Plan - Electronic data		US							
O&A-SS-418	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.	LA	3					For service agreements or contracts related to equipment repairs and service, retain in accordance with item number 5.1.001.	
O&A-SS-419	5.2.014	Inventory - Annual Physical	Property, equipment, supplies verifications	FE	3					Requirement maintained by the State Comptroller	
O&A-SS-420	5.2.017	Lost & Stolen Property Reports	Agency documented records of any lost or stolen property. Records are submitted to the State of Office of Risk Management as required.	FE	3					Requirement maintained by SORM	
O&A-SS-421	5.2.021	Surplus Property Sale Reports	Disposition of surplus property in coordination with the Texas Comptroller and Texas Facilities Commission	FE	3						Government Code Chapter 2175
O&A-SS-422	5.2.027	Space Utilization Reports	Reporting analyzing the space usage of the agency that is provided to the Texas Facilities Commission	AV						Requirement maintained by the Texas Facilities Commission	



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O&A-SS-423	5.4.007	Hazardous Materials Training Records	Records of training given employees in an agency hazard communications program.		5						Texas Health & Safety Code, 502.009(g).
O&A-SS-425	5.6.005	Vehicle Use Reports	Includes mileage, fuel/oil consumption, passengers carried and other related operational information.	FE	3					Provided to the Comptroller and Office of Fleet Management	
OGC-301	1.1.014	Legal Opinions and Advice	From agency legal counsel or the Attorney General, including any requests eliciting the opinions and the research related thereto	AV					R	CAUTION: Does not include legal opinions or advice rendered on a matter in litigation or with regard to pending litigation. SEE item number 1.1.048.	
OGC-302	1.1.020	Public Information Requests - Not Exempted	Correspondence and documentation relating to requests for records furnished to the public, under Public Information Act (Chapter 552, Government Code).	AC	1			AC = Date request fulfilled.			
OGC-303	1.1.021	Public Information Requests – Exempted	Correspondence and documentation relating to requests for records that are exempt under Public Information Act (Chapter 552, Government Code)	AC	2			AC = Date of notification that records are exempt.			



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OGC-304	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		Electronic	
OGC-305	1.1.048	Litigation Files	Records created by or on behalf of the Texas Water Development Board in anticipation of or in the adjudication of a lawsuit. Includes EEOC files.	AC	1			AC = As applicable, decision of an agency not to file a lawsuit or decision that a lawsuit will not be filed against it on a matter; dismissal of a lawsuit for want of prosecution or on motion of the plaintiff; or final decision of a court (or of a court on appeal, if applicable) in a lawsuit.	R	ARCHIVES NOTE: Cases that set legal precedent or exhibit historical value will be evaluated by the Archives and Information Services Division of the Texas State Library and Archives Commission for archival preservation.	
OGC-307	1.1.059	Meetings, Certified Agendas or Tape Recordings of Closed	Certified agendas or tape recordings of closed meetings of the Texas Water Development Board, Texas Water Resource Finance Authority, Water Conservation Advisory Council and Work Sessions.	AC	2			AC = The date of the meeting or completion of pending action involving the meeting, whichever is later.		SEE caution comment at item number 1.1.058.	Government Code, 551.104 (a).



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OGC-308	1.1.060	Meetings, Audio or Videotapes of Open	Texas Water Development Board, Texas Water Resource Finance Authority, Water Conservation Advisory Council, and Work Sessions	AC			90	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 may not retain audio or videotapes of the meetings of governing bodies in lieu of written minutes. The proceedings of all meetings of state boards, committees, commissions, and councils must be reduced to writing. SEE caution comment at item number 1.1.058.	
OGC-309	1.1.072	Public Information Reports	Reports made to the Office of the Attorney General on an agency's Public Information activities.		2						
OGC-310		Supporting Documentation - Rule Making	Supporting Documentation for Rule Making (not submitted to register), includes Fiscal Note Memo	AC				AC=-publication of final rule in TX Register or date of withdrawal			
OGC-311	1.2.011	Record Center Storage Approval Forms (RMD 106)	Agency copy	US							



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OGC-312(a)	5.1.001	Contract Disclosure of Interested Parties	a) Executed, renewed, or amended on or after September 1, 2015.	AC	7			AC = Expiration or termination of the instrument according to its terms.		SEE related item numbers 3.1.035 Performance Bonds and 5.3.007 Bid Documentation. SEE item number 5.2.028 for building construction contracts and item number 5.1.017 for contract logs.	Texas Government Code, 441.1855
OGC-408	1.2.001	Destruction Authorizations	Agency level documents authorizing final disposition of records under a certified records retention schedule.	FE	3						
OGC-409	1.2.005	Records Retention Schedule (SLR 105)	Agency copy. Formerly RMD 105. Includes documentation of certification and approval - forms SLR 105C (formerly RMD 105C) and/or other forms designated by the State Records Administrator.	US						Original is retained by the State and Local Records Management Division, Texas State Library and Archives Commission.	



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					Years	Months	Days				
OGC-410	1.2.006	Records Transmittal Forms	Agency copy (includes RMD 10-1, Tx-R-5, 306-58-1, and Agency Storage Forms). Forms indicate records transferred to storage or a transfer of legal custody.	AC	2			AC = Date of authorization for destruction, permanent transfer from storage, or transfer to the Archives and Information Services Division, Texas State Library and Archives Commission, by the agency records management officer			
OGC-411	1.2.008	Request for Authority to Dispose of State Records (RMD 102)	Agency copy	FE	3					Original is retained by the State and Local Records Management Division, Texas State Library and Archives Commission.	
OGC-412	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						
OGC-414	1.2.012	Records Inventory Worksheets		US							



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OGC-416	1.2.014	Records Management Plans	Records management plans and similar records that establish the policies and procedures under which records and information are managed in an agency.	US	1						
TNRS-801	1.1.007	Correspondence - Administrative	U.S. Geological Survey – Earth Science Information Center (ESIC), Geographic Names Information System (GNIS).		5				R		
TNRS-803	1.1.064	TNRIS User Request Logs	Logs used to evaluate performance measures.	FE	3						
TNRS-805	1.2.013	Maps / Mosaics / Indexes	Used by TNRIS as a control aid.	AC				AC = When control aid is updated, revised, or no longer needed.		CAUTION: These records must carry the same retention period and archival code of the records they support.	



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TNRS-806	1.3.001	Published Reports	Includes GIO Report and STRATMAP Contracts Annual Report	PM						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. 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).	



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					Years	Months	Days				
TNRS-807	1.3.002	Supporting Documentation for Publish Reports	Includes reports, manuscripts and correspondence for GIO Report and STRATMAP Contracts Annual Report	PM					R		
TNRS-809		Maps – Topographic	Historical Collection	US					R		
TNRS-810		Remote Sensing Data	Aerial photos and satellite imagery.	PM					A		
TNRS-811		StratMap GIS Data Layers		PM							
TNRS-814	5.3.004	Order Forms	Original hard copy of order request filled.	AC			30	AC=Date order filled.			
WSC-804		Driller Logs and Well Schedules	Information Raw Data	PM						Information received from other agencies. Paper copy maintained permanently at TWDB.	
WSC-812		Maps with Well Locations	7.5 Minute Series Topographic - groundwater studies		3						
WSC-813		Maps with Well Locations	Full Scale County Highway		3						



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WSC-FM-815		National Flood Insurance Records (NFIP)	Includes Community Assistance Visit (CAV) records	AC	1			AC= Until next CAV is completed/submitted/reviewed by FEMA		Files are stored electronically on the FEMA web-based database. FEMA requires records to be available for three years after the closeout of the grant date, or in this case, the year the CAV was performed.	
WSC-FM-816		National Flood Insurance Records (NFIP)	Includes Community Assistance Contact (CAC) records		5					All files are stored electronically on the FEMA web-based database; Community Information System, as well as tracked at the TWDB and kept on the public drive.	
WSC-904		Reported Water Savings and Irrigation Metering Data: Agricultural Conservation Grants and Loans 1994-Current	Electronic program management files.	PM						Input to Performance Measures. Electronic 2000 thru present.	



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WSC-905		Water Conservation Technical Assistance and Publications - Data Base	Includes 1994-Current.	PM						Input to Performance Measures in e-file.	
WSC-906		Chemical Water Analysis Report			1					Electronic: all chemical analysis data is entered in GW database, associated documents are scanned	
WSC-908		Suspended Sediment Sampling Data	Hard copies of data from the state's historic (now discontinued) sediment sampling program for various locations and rivers in the state. Data may be used for scientific studies	PM							



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WSC-909		Bays and Estuaries Data	Water Quality (salinity, temperature, dissolved oxygen, depth), Coastal Hydrology (gaged, modeled, diversions, returns) , Water Circulation (velocity and direction), Bathymetry, Model Input (tides, salinity, precipitation, evaporation) and Modeled Output (water velocity and direction, surface elevation, salinity), GPS-RTK Survey Data	PM							
WSC-910		Evaporation Stations (30)	Station Ids, names, locations (County, coordinates) for the 46 evaporation stations in Texas.	PM							
WSC-913		Evaporation Data and Computer Codes	daily and monthly evaporation data from TWDB COOP stations; daily and monthly precipitation data from NCDC; quadrangular monthly evaporation and precipitation rates for Texas quadrangles; data processing computer code.	PM							
WSC-914		NRCS Irrigation Inventories: 1958-64-69-74-79-84-89-94-2000	Interagency (NRCS and TWDB) cooperative detailed 5-year surveys.	PM						Electronic	



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WSC-915		Oil Field Brine - Water Quality Reports and Data		PM						Electronic: all data is entered in GW database, associated documents are scanned	
WSC-916		Water Conservation Plans and Reports-TWDB Loan Applicants	Program management. Input for loan reviews and status reports.	AC	7			AC = After receipt of acceptable plan and annual report.			
WSC-917		Water Conservation Plans and Reports-Non TWDB Loan Applicants	Program management electronic data from reports.	PM						Electronic	
WSC-918		Annual Irrigation Use Estimates	County data sheets. Electronic files of summary data.	PM							
WSC-919		Groundwater - Located Well Data by County - Evaluating Groundwater Availability	In & around Bruni, Webb Co, TX.	PM						Electronic: all data associated with this report is entered in GW database, associated documents are scanned	
WSC-920		Groundwater - Located Well Data by County - Evaluating Groundwater Quality	Garden City, Texas.	PM						Electronic: all data associated with this report is entered in GW database, associated documents are scanned	



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WSC-921		Groundwater - Located Well Data by County	Lower Rio Grande Valley; Parts of Loving, Pecos, Reeves, Ward, and Winkler Counties in TX; Part of North Central Texas; Part of Central Texas; Orange and Eastern Jefferson Counties; Fort Bend County; Parts of the Rolling Prairies Region of North Central Texas; El Paso County; Bell, Burnet, Travis, Williamson and parts of adjacent counties; In the vicinity of the cities of Henderson, Jacksonville, Kilgore, Lufkin, Nacogdoches, Rusk, and Tyler in East Texas; In and adjacent to Dripping Springs, TX.; Southern High Plains of TX Includes un-plotted drillers logs and well schedules which have been given a unique number for the study on: High Plains, TX; The Bone Springs –Victoria Peak Aquifer in the Dell Valley area of TX; Southern High Plains of TX; Edwards Aquifer in the Austin area; Terlingua area of TX; Carrizo-Wilcox Aquifer in the Central Region of TX.	PM						Electronic: all data associated with these studies is scanned and is entered in GW database, associated documents are scanned.	



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WSC-922		Groundwater Management Plans	Chapter 36 Groundwater Conservation Management Plans; Edwards Aquifer; Ogallala Aquifer; Gulf Coast; High Plains (includes overview and projection, 1980-1990); Rio Grande; Winter Garden Area.	PM						Electronic, paper convenience copies stored on shelves for 10 years max	
WSC-923		Groundwater Geology - West TX.			10					Electronic: all data associated with these studies is scanned and is entered in GW database, associated documents are scanned	
WSC-924		Groundwater – Correspondence	Recharge/TX.		5					Electronic: all data associated with these studies is scanned and is entered in GW database, associated documents are scanned	
WSC-925		Located Well Data Survey		AV							
WSC-926		Located Well Data Location Maps Survey		PM							



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WSC-927		Survey of Ground and Surface Waters		AV						Electronic: all data associated with these studies is entered in GW database, associated documents are scanned	
WSC-929		Water Level Observation Field Books		PM						Electronic: GwM keeps these field books on site. When the Section transfers monitoring duties and field books to appropriate districts, or the well is no longer being monitored, GwM scans copies of the field books	
WSC-930		Water Level Observation Maps		PM						Electronic: all data associated with these maps is entered in GW database. Maps are produced as needed with data specified from GW database.	
WSC-931		Water Level Observation Pumping Levels		PM							



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WSC-932		Water Quality Monitoring Maps		PM						Electronic: all data associated with these maps is entered in GW database. Maps are produced as needed with data specified from GW database.	
WSC-934		Recreation - General	Includes correspondence, reviews, reports, plans and studies of state and federal recreation projects.		5						
WSC-936		Drought Information	Includes Municipal, Industrial, and Agricultural Drought Management and Conservation; Drought Indices; Water Audit.		10					WAM Team maintains electronic drought index data	



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WSC-937		Model, Supporting Documentation, and Applications:	The Edwards (Balcones Fault Zone) Aquifer, San Antonio areas of TX; Carrizo-Wilcox; Edwards (BFZ) Aquifer -North; Edwards (BFZ) Aquifer - Barton Springs; Edwards (BFZ) Aquifer - San Antonio; Edwards-Trinity (Plateau) Aquifer/ Cenozoic Pecos Alluvium (Pecos Valley); Gulf Coast Aquifer - North; Gulf Coast Aquifer - Central; Gulf Coast Aquifer - South; Igneous Aquifer/West Texas Bolsons; Lipan Aquifer; Queen City-Sparta Aquifer - North; Queen City-Sparta Aquifer - Central; Queen City-Sparta Aquifer - South; Ogallala Aquifer -North; Ogallala Aquifer - South; Hueco Bolson; Mesilla Bolson; Seymour Aquifer; Trinity Aquifer - Hill Country; Trinity Aquifer – North; Paleozoic and Cretaceous Aquifers Model in the Hill Country of TX.	PM							



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WSC-938		Reports and Studies (Non-Fiscal)	Reports and supporting documentation on Carrizo-Wilcox Model; High Plains System; Edwards Aquifer; San Jacinto River Basin Model; Update on Area 16, Rolling Plains of North Central Texas, 1998; PGMA Area 1; PGMA Area 5; PGMA Area 6; PGMA Area 8; PGMA Area 11.	PM							
WSC-939		Changes in Groundwater Conditions	El Paso County, 1988–1998 and Gaines County, 1998.	PM						Electronic: all data associated with this report is entered in GW database, associated documents are scanned	
WSC-942		Basin Boundary Delineation Map	Coastal watershed delineations used to compile coastal hydrology data (freshwater inflow estimates).	PM							
WSC-943		Tide Gage Information	Tide forecast information is based on observed tide data scraped from National Oceanic and Atmospheric Administration and Texas Coastal and Ocean Observation Network websites	PM							
WSC-944		Surface Water Information			5						



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WSC-945		Reports and Supporting Documentation	Trans-Texas Water Program.	PM						Electronic: all data associated with this report is entered in GW database, associated documents are scanned	
WSC-946		Reservoir Information	Dam data, elevation-storage relationship curves, and daily elevation or storage data. Includes historical documents, maps, photos, and misc. information relating to reservoirs.	PM							
WSC-947		Evaporation Rates Data 1940 - 1965	daily and monthly evaporation data from TWDB COOP stations; quadrangular monthly evaporation for Texas quadrangles	PM							
WSC-953		Supporting Documentation	Water Allocation - '90 St. Water Plan; Water Allocation - '97 St. Water Plan.	PM							
WSC-954		TWDB Water Education Program- Major Rivers Orders	2003-Current.	AC	3			AC = After completion of annual process of receiving orders, delivering orders for materials, and collection of payments for orders.			



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WSC-956	1.3.001	Published Reports and Supporting Documentation	Includes reports, manuscripts and correspondence for desalination, water reuse, rainwater harvesting, aquifer storage recovery, brackish resource aquifer characterization system, groundwater availability, water quality records and other data that results in a published report.	PM							
WSC-957		Innovative Water Technologies' Contracts	Includes contract agreements, scope of services, correspondence, and schedules.	AC	5			AC = After contract is closed; final report accepted and liquidation completed.			
WSC-958		Desired Future Conditions Report	records submitted to TWDB by groundwater conservation districts, includes hearing processes.		10				R		Texas Water Code 36.108
WSC-959	1.1.065	Underground Reservoir Delineations		AV							
WSC-960	1.1	Historic River Survey Data	maps from US Army Corps of Engineers.	PM							
WSC-961	1.1.065	Reports and Studies – Non-Fiscal Well	Information or data collected and compiled for the purpose of producing non-fiscal groundwater studies.	AV							



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WSI-702	1.1	Program Documentation - State Revolving Fund (SRF) - Final	Program files received from WSI	AC	3			AC = Completion or termination of program, rules, policies, procedures or life of grant award.	R	Records maintained in File Room 630	
WSI-703	1.1	Pending Applications	Applications that have not yet been presented to the Board or were withdrawn, terminated, or bypassed.	AC	1			AC = Withdrawn, Terminated, Bypassed or Not Completed		All funding types. Records maintained in File Room 630.	
WSI-704	1.1	Cancelled and expired commitment applications and workpapers	Includes final application for financial assistance and the financial analyst's work papers. This is sent to the file room by RWPD after Board commitment. Only commitments that have been cancelled, expired, etc.	AC	3			AC = Cancelled and Expired		All funding types. Records maintained in File Room 630.	
WSI-706	1.1	Master Engineering Files	Planning, Design, and Construction correspondence and documents. Includes specifications, contracts, and field inspections pertaining to the Engineering, Environmental and Construction of a project.	AC	30			AC= After close when outstanding loan is paid in full.	R	All funding types. Final accounting date. Records maintained in File Room 630	



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WSI-709	1.1.024	Project's Construction Plans		AC	30			AC= After close when outstanding loan is paid in full (all funding types). Final accounting date.	R	Plans transferred to the SRC for digitizing and hard copy destroyed. Master copy kept at the SRC. Records maintained in File Room 630	
WSI-710	1.1	Project Information Form (PIF) (SRF)	documents related to the State Revolving Fund (SRF) that do not receive board commitment.(unfunded).	FE	2						
WSI-817		Loan Review Documentation		AC				AC=Completion or termination of project			
WSI-901		LAR - Water Supply Area Planning	(A) Senate Bill 1 Regional Water Planning Groups Notebook Files; (B) Senate Bill 1 ICB Files.	PM					A		
WSI-902		Public Agency Inquiries and Technical Assistance Requests - State Water Plan (SWP) Database	All Water Use, Projections, and Planning (WUPP) data requests		10						
WSI-903		Legislation	Public Comments on Senate Bill 1 Water, and Planning Region Delineation, 1997-1998	PM						Retained at agency.	



**STATE OF TEXAS**  
**Records Retention Schedule**

SLR 105  
Rev. 2017-07

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

1. AgencyCode: 580		2. Agency Name: Texas Water Development 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				
WSI-912		Texas State Water Plan		PM						In storage at SRC.	
WSI-912a		Texas State Water Plan	State Water Plan Supporting Documentation		50						
WSI-948		TWDB Population Projections		PM							
WSI-949		Arkansas - White-Red IAC			20				R	IAC - Interagency Committee.	
WSI-952		Survey of Ground & Surface Water Use	Annual water use surveys of public water systems and large industrial/manufacturing facilities	PM						Electronic storage only on agency server – scan and destroy paper	
WSI-958		Regional Water Plan	Includes Initially Prepared Plan and Adopted Plan		75				R		
WSI-961		Water Bank & Trust	Water Bank and Trust Documentation	PM						Records Maintained in Room 530B	
X009		Loan Applications		AC	25			AC = after outstanding loans completely paid in full	E		
X010		Report/Water Supply Studies		PM					A		
X011		WSL - Water Supply Loan Program			25						



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X012		WQEL (Water Quality Enhancement Loan Program)			25						