



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.*

Ms. Kate Oehlers
Human Resources Director
Texas School for the Blind and Visually Impaired
1100 W. 45th St.
Austin, TX 78756

Re: Agency records retention schedule amendment approved for use

Dear Ms. Oehlers:

Amendment 1 to your agency's 4th recertification of your records retention schedule is approved for use as of Thursday, November 12, 2015. 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, Julie Wagner, at 512-463-6623 or jwagner@tsl.texas.gov.

Sincerely,

Craig Kelso
Director and State Records Administrator

cc: State Auditor, State Archivist, William Daugherty

R01.771/771

771 MS

to Marianna on 7/8/15



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 771
Agency Name Texas School for the Blind and Visually Impaired

(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 *Kate Ochlers*
Name (Print or type) Kate Ochlers
Date 7/8/15

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 *Donna Osborne*
Name (Print or type) Donna Osborne
Date 11/12/15

Cert/Recert No. 4 Amendment No. 1



STATE OF TEXAS

Records Retention Schedule Amendment

SLR 122

Form SLR 105C must accompany this form.

1. Page of

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired									
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.		Agency Item No.		

	AR-1	Student Record Working Files including 1) Application, Record Release Requests, Enrollment Information (Address, Phone Numbers, Local School District of Residence), Full & Individual Evaluation (most recent), FIE Eligibility Reports for Disability Eligibility Annual ARD Committee Documents (most recent), Graduation/Dismissal ARD Documents (if different from Annual), AAR, Eye Exam (oldest and latest), Low Vision Evaluation (if applicable), Social History (Social Worker's Intake Report), Psychological-Intellectual Evaluation (most recent), Psychiatric Evaluation (if applicable), Immunization Record, Birth Certificate, Social Security Document, Guardianship document (if applicable) 2) enrollment lists and rosters; 3) records maintained pursuant to the Individuals with Disabilities Education Act; 4) records maintained pursuant to any state requirement contained in the Texas Education Code; and 5) health and medical records; and 6) any other record maintained during a student's enrollment	AC	7	AC+7	AC = July 15 of the calendar year following 1) the student's graduation from high school or 2) the date of the student's ineligibility for services under the Individuals with Disabilities Education Act. Retention pursuant to 34 CFR 75.73, 75.734, 300.573 With respect to column three description: 1) records will be digitized; 2) records will be maintained without time limitation in student electronic data base				N
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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		



STATE OF TEXAS

Records Retention Schedule Amendment

SLR 122

Form SLR 105C must accompany this form.

1. Page of

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired									
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.		Agency Item No.		

	AR-2	Student Health and Related Services (SHARS) documentation	AC + 1	6	AC + 7	AC = July 15 of the calendar year during which the record was created				N
	AR-3	Student Permanent File including 1) Application, Record Release Requests, Enrollment Information (Address, Phone Numbers, Local School District of Residence), Full & Individual Evaluation (most recent), FIE Eligibility Reports for Disability Eligibility Annual ARD Committee Documents (most recent), Graduation/Dismissal ARD Documents (if different from Annual), AAR, Eye Exam (oldest and latest), Low Vision Evaluation (if applicable), Social History (Social Worker's Intake Report), Psychological-Intellectual Evaluation (most recent), Psychiatric Evaluation (if applicable), Immunization Record, Birth Certificate, Social Security Document, Guardianship document (if applicable)	PM	PM	PM	This is a digitized portion of the student record AR-1 that will be kept permanently.				N

Retention Codes (Field 7)			Archival Codes (Field 8)		Amendment Codes (Field 12)	
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AV – Administrative Value	FE – Fiscal Year End	PM – Permanent			D – Deleted	
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STATE OF TEXAS

Records Retention Schedule Amendment

SLR 122

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			Agency	Storage	Total			9. Remarks	Page No.	

	AR-4	Short-Term Program Student Records Including 1) Permission Forms, Application, Attendance Record and Reports 2) any other record maintained during a student's attendance not mentioned in record series item number AR-5, AR-6 and AR-7.	AC	-	AC	AC=7 years from the date the record was created and/or signed. Retention pursuant to Local Schedule SD SD3200-03,04,07; SD3225-02d; SD3275-02a,b; SD3300-10				N
	AR-5	Short-Term Program Student Record Release Requests and Consents.	PM	-	PM	Retention pursuant to Local Schedule SD SD3225-02a-c				N
	AR-6	Short-Term Program Student Online Student Incident Reporting System (OSIR) Reports	AC	-	AC	AC= The school year student turns 30 years of age Retention pursuant to Local Schedule SD SD3300-01				N

Retention Codes (Field 7)			Archival Codes (Field 8)		Amendment Codes (Field 12)	
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STATE OF TEXAS

Records Retention Schedule Amendment

SLR 122

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1. Page of

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival 9. Remarks	10. 106 No.	11. Current Schedule		12. Amend. Type
			Agency	Storage	Total			Page No.	Agency Item No.	

	AR-7	Short-Term Program Student Health and Medical Records	AC	-	AC	AC=7 years from the date of last known attendance to Short-Term Programs Retention pursuant to Local Schedule SD SD3300-03,05,11a,b				N
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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		
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	LA – Life of Asset	US – Until Superseded		D – Deleted		



January 5, 2015

Ms. Kate Oehlers
Human Resources Director
Texas School for the Blind and Visually Impaired
1100 W. 45th St.
Austin, TX 78756

RE: Agency records retention schedule approved for use

State and Local
Records Management

Dear Ms. Oehlers:

P.O. Box 12927
Austin, Texas
78711.2927

Your agency's records retention schedule is approved for use as of December 22, 2014. Your currently approved records retention schedule is available on our website at <https://www.tsl.texas.gov/slrn/state/schedules.html>. Please ensure all old copies of the schedule are superseded with this recertified copy.

4400 Shoal Creek Blvd.
Austin, Texas
78756

Your approved retention schedule provides you with continuing authorization to dispose of agency records according to its terms. Please note that state regulations (13 TAC §6.8) require documentation of the final disposition of records by your agency. This requirement may be met by maintaining a disposition log or other evidence of the records series titles, dates covered, volume, and date of disposition. 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.

www.tsl.texas.gov

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 **December 2019**.

Commission Chairman
Michael C. Waters

During a certification period changes may need to be made to your schedule. State regulations (13 TAC §6.4) also allow for the submission of amendments to the retention schedule as needed to keep the information in the schedule current. If you are not familiar with the amendment process, or if you have any other questions, please contact the Government Information Analyst assigned to your agency, Marianna Symeonides, at 512-463-5448 or msymeonides@tsl.texas.gov.

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

Your efforts in developing a records retention schedule are appreciated. It not only helps to ensure the integrity of your recordkeeping practices, but it is also essential to the success of your records management program.

Director and Librarian
Mark Smith

Sincerely,

Assistant State Librarian
Edward Seidenberg

A handwritten signature in blue ink, appearing to read "CK" or "Craig Kelso".

Craig Kelso
Director and State Records Administrator

*Preserving yesterday,
informing today,
inspiring tomorrow.*

cc: State Auditor, State Archivist, William Daugherty

R01.771/771



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 771

Agency Name Texas School f/t Blind and Visually Impaired

(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 *Kate Oehlers*

Name *(Print or type)* Kate Oehlers

Date October 23, 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 *E. Siderberg*

Name *(Print or type)* _____

Date 12.22.14

Cert/Recert No. 4 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.

1. Page 1 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired						
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			
1.1.002	A-A-3	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+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	A-A-11	Legislative Appropriation Requests Including any supporting documentation created and/or used to justify and support legislative appropriations requests by an agency.	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.		

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			
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist			



STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 2 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired						
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			

1.1.007	A-A-4	Administrative Correspondence Incoming/outgoing and internal correspondence pertaining to the formulation, planning, implementation, interpretation, modification, or redefinition of the programs, services, or projects of an agency and the administrative regulations, policies, and procedures that govern them.	4		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.		
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Retention Codes (Field 7)						Archival Codes (Field 8)		
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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 3 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired							
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				
1.1.008	A-A-5	General Correspondence Non-administrative incoming/outgoing and internal correspondence, in any media, pertaining to or arising from the routine operations of the policies, programs, services, or projects of an agency.	2		2		SEE comment to item number 1.1.007		
1.1.014	A-A-12	Legal Opinions and Advice From agency legal counsel or the Attorney General, including any requests eliciting the opinions.	AV		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.		
1.1.020	A-A-31	Public Information Requests - Not Exempted Includes all correspondence and documentation relating to requests for records that are furnished to the public under Public Information Act (Chapter 552, Government Code).	AC+1		AC+1		AC=Date request fulfilled		

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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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 4 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired							
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	A-A-32	Public Information Requests - Exempted Includes all correspondence and documentation relating to requests for records that are exempt the Public Information Act (Chapter 552, Government Code).	AC+2		AC+2		AC=Date of notification that records are exempt		
1.1.027	A-A-33	Proposed Legislation Drafts of proposed legislation and related correspondence	AV		AV				
1.1.023	A-A-17	Organization Charts	US		US	A			

Retention Codes (Field 7)						Archival Codes (Field 8)			
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STATE OF TEXAS

Records Retention Schedule

SLR 105

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1. Page 5 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired						
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			
1.1.060	A-A-18	Meetings, Audio or Video Tapes of Open Audio or videotapes of open meetings of state boards, commissions, committees, and councils.	AC+90 days		AC+90 days	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 board, committees, commissions, and councils must be reduced to writing, SEE caution comment at item number 1.1.058.		

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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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 6 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired							
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				
5.4.011	A-A-19	Visitor Control Ledgers Logs, registers, or similar records Documenting visitors to limited access or restricted areas of agency facilities	3		3				
5.4.013	A-A-20	Disaster Preparedness and Recovery Plan	US		US				

Retention Codes (Field 7)						Archival Codes (Field 8)			
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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 7 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired						
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			

1.1.048	A-A-34	Litigation Files Records created by or on behalf of an agency in anticipation of or in the adjudication of a lawsuit.	AC+1		AC+1 R	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. 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.		
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Retention Codes (Field 7)						Archival Codes (Field 8)	
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STATE OF TEXAS

Records Retention Schedule

SLR 105

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1. Page 8 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired						
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			
1.1.055	A-A-35	Strategic Plans Informational resources and operational strategic plans prepared in accordance with 2054.095 and 2056.002, Government Code.	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 plans to the Texas State Publications Depository Program, Texas State Library and Archives Commission.		

Retention Codes (Field 7)						Archival Codes (Field 8)	
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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 9 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired					10. 106 No.		11. TSLAC ONLY Amend. No.
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				

1.1.058	A-A-7	Meeting Agenda and Minutes Official agenda and minutes of state boards, committees, commissions, and councils that conduct open meetings as required by Government Code, Chapter 551.	PM		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. CAUTION: This records series and item number 1.1059 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.		
Retention Codes (Field 7)							Archival Codes (Field 8)		

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STATE OF TEXAS

Records Retention Schedule

SLR 105

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1. Page 10 of 41

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			Agency	Storage	Total			
1.1.059	A-A-6	Certified Agendas or Recordings of Closed Meetings Certified agendas or tape recordings of closed meetings of state boards, commissions, committees, and councils.	AC+2		AC+2	AC= The date of the meeting or completion of pending action involving the meeting, whichever is later. Government Code, 551.104(a). SEE caution comment at item number 1.1.058.		
1.1.064	A-A-16	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		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.		

Retention Codes (Field 7)						Archival Codes (Field 8)	
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STATE OF TEXAS

Records Retention Schedule

SLR 105

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1. Page 11 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired						
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			Agency	Storage	Total			
1.1.066	A-A-15	Annual/Biennial Reports (Narrative) Biennial narrative reports to the governor and legislature as required by agency's enabling statutes, including annual narrative reports if they are required by statute.	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 reports to the Texas State Publications Depository Program, Texas State Library and Archives Commission.	

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			
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist			



STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 12 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired						
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			
1.1.067	A-A-10	Reports and Studies – Non-Fiscal Annual, sub-annual, or special reports or studies on non-fiscal aspects of an agency's programs, services, or projects compiled by agency personnel, by advisory committees, or by consultants under contract with an agency that are not noted elsewhere in this schedule. Includes reports distributed either internally or to other entities. Includes National Accreditation Council Reports.	3		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 page x of the Texas State RRS for more information.	
1.1.068	A-A-13	Performance Measures Reports Quarterly and annual reports on agency performance measures submitted to executive and legislative offices.	AC+6		AC+6		AC= September 1 of odd-numbered calendar years.	

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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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 13 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired						
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			
1.1.070	A-A-1	TSBVI Policies and Procedures Manuals, guidelines, administrative rules, or similar records distributed internally for the use of employees or externally to the public or those individuals or entities regulated by an agency that sets out the rules, policies, and procedures that govern an agency's programs, services, or projects.	AC+3		AC+3	R	AC=Completion or termination of program, rules, policies or procedures. SEE ALSO Agency Rules, Policies and Procedures – Working Files, 1.1.071.	
1.1.071	A-A-2	TSBVI Policies and Procedures - Working Files Working files used in the development of manuals, guidelines, administrative rules, or similar records distributed internally for the use of employees or externally to the public or those individuals or entities regulated by an agency that sets out the rules, policies, and procedures that govern an agency's programs, services, or projects.	AC+3		AC+3	R	AC=Completion or termination of program, rules, policies or procedures. SEE ALSO Records Series Item Number 1.1.070.	

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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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 14 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired						
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			
1.2.005	A-A-14	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		US	Original is retained by the State and Local Records Management Division, Texas State Library and Archives Commission.		
1.2.008	A-A-36	Records Disposal Requests Agency copy.	FE+3		FE+3	Original is retained by the State and Local Records Management Division, Texas State Library and Archives Commission.		
1.2.010	A-A-37	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		10			

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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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 15 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired						
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			
2.1.007	A-DS-31	Software Programs Automated software applications and operating system files including job control language, program listing/source code, etc.	AC		AC	AC=Until electronic records are transferred to and made usable in a new software environment or there are no electronic records being retained to meet an approved retention period that require the software to be retrieved and read. 13 TAC 6.94. CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.		

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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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 16 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired								
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					
2.1.008	A-DS-32	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	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. 13 TAC 6.94. CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.				

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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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 17 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired						
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			

2.1.009	A-DS-1	<p>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.</p>	AC		AC	<p>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. 13 TAC 6.94.</p> <p>CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.</p>		
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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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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 18 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired							
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				
2.1.010	A-DS-33	Audit Trail Records Files needed for electronic data audits such as files or reports showing transactions accepted, rejected, suspended, and/or processed; history files/tapes; records of online updates to application files or security logs.	AC		AC		AC=All audit requirements have been met		
2.2.001	A-DS-34	System Monitoring Records Electronic files or automated logs created to monitor computer systems such as print spool logs, console logs, tape activity logs, etc.	AV		AV				

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					
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist					



STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 19 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired						
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			
2.2.010	A-DS-6	Data Processing Policies and Procedures Manuals, guidelines, or similar documents, establishing data processing policies and procedures in an agency in such areas as access and security, systems development, data retention and disposition, data ownership, production control, system back-up, etc.	US+3		US+3	CAUTION: Does not include technical documentation of procedures necessary for reading or processing of electronic records. SEE item number 2.1.009.		
2.2.016	A-DS-35	Software Registrations, Warranties and License Agreements	LA+3		LA+3			
3.1.001	A-P-6a	Employment Applications – 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		2	29 CFR 1602.31 [State Agencies].		

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		
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded			R – Review by State Archivist		



STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 20 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired						
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			
3.1.002	A-P-6b	Employment Applications – 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+5	AC=Termination of employment.		
3.1.011	A-P-11	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	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.		
3.1.012	A-P-18	Job Announcements Internal or external announcements or advertisements of job openings, promotions, training programs, or opportunities for overtime.	2		2	29 CFR 1602.31 [State Agencies].		

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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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 21 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired						
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			
3.1.013	A-P-1	Employment Contracts	AC+4		AC+4	AC=Expiration or termination of contract according to its terms.		
3.1.014	A-P-6c	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		2	29 CFR 1602.31 [State Agencies]. CAUTION: Does not include criminal history checks. See item 3.1.026.		

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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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 22 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired						
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			
3.1.018	A-P-20	Grievance Records Records relating to the review of employee grievances against personnel policies, working conditions, etc.	AC+2		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.		
3.1.019	A-P-2	Performance Appraisals	2		2	29 CFR 1620.32(c)		

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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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 23 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired						
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			
3.1.021	A-P-23	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+5	AC=Termination of employment.		

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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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 24 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired						
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			
3.1.022	A-P-22	Personnel Action Forms Forms or similar records used to create or change information concerning the records of an employee including pay grade, position classification, employee number, evaluation date, and termination of employment.	2		2	29 CFR 1602.31 [State Agencies]		
3.1.023	A-P-17	Job Descriptions Job descriptions, including all associated tasks or skill statements, for positions in an agency.	AC+4		AC+4	AC=Until superseded or job eliminated. 40 TAC 815.106(i).		

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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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 25 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired						
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			
3.1.026	A-P-3	Criminal History Checks Criminal history record information on job applicants or agency employees obtained from the Department of Public Safety (DPS)	AC		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 the information.		

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			
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist			



STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 26 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired						
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	A-P-5	Employment Eligibility (INS I-9)	AC+1		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 is later. Agencies should make certain that the INS I-9 forms for employees who terminate from an agency less than 3 years from date of hire are kept for the 3 year retention period 8 CFR 274a.2(b)(2)(i)(A)and(c)(2)		
3.2.001	B-A-5a	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+4	AC=After termination of employee or after amendment, expiration, or termination of authorization, whichever sooner.		
3.2.002	B-A-6	Employee Earnings Records	4		4	40 TAC815.106(i).		

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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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 27 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired						
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			
3.2.003	B-A-31	Federal Tax Records Includes 1099, W2, FICA, and other tax records.	AC+4		AC+4	AC=Tax due date, date the claim is filed, or date tax is paid whichever is later. 26 CFR 31.6001 – 1(e)(2).		
3.2.005	B-A-5b	W-4 Forms Employer's copy of "Employee's Withholding Exemption Certificate."	AC+4		AC+4	AC=Until superseded, obsolete, or upon separation of employee. 26 CFR 31.6001 – 1(e)(2).		
3.2.007	B-A-32	Unemployment Compensation Records	AC+5		AC+5	AC=Disposition of Claim		
3.2.008	B-A-23	Direct Deposit Applications	US		US			

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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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 28 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired						
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			
3.2.009	B-A-24	Deferred Compensation Records	AC+5		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 <i>Benefits Coordinator Reference Manual</i> issued by the Employees Retirement System of Texas.		
3.2.010	A-P-9	HRIS Reports and Documentation Includes supporting documentation	AC+4		AC+4			
3.3.004	A-P-13	Benefit Plans Employee benefit plans such as pension, life, health, and disability insurance; deferred compensation; etc., including amendments.	US+1		US+1	29 CFR 1627.3(b)(2).		

Retention Codes (Field 7)						Archival Codes (Field 8)	
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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 29 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired						
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			Agency	Storage	Total			
3.3.011	A-P-4	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+75	AC=Termination of employment.		
3.3.024	A-P-19	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		US+3			
3.3.027	A-P-6d	Aptitude and Skills Tests Aptitude or skills tests required of job applicants or of current personnel to qualify for promotion or transfer.	US+2		US+2	29 CFR 1602.31 [State Agencies] CAUTION: One copy of each different test (different in terms of either questions or administration procedures) should be retained for the period indicated.		

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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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 30 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired						
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			

3.3.031	A-P-10	EEO Reports and Supporting Documentation Includes documentation used to Complete EEO reports	3		3	29 CFR 1602.32, 1602.39, 1602.41, 1602.48, and 1602.50		
3.4.001	A-P-15	Accumulated Leave Adjustment Requests Used to create employee leave balances, to transfer leave balances when an employee transfers positions, to adjust carry-over balances on August 31, to correct errors on leave accumulation, and to close out leave accounts on on separated employees.	FE+3		FE+3			
3.4.002	A-P-8	Leave Balance Reports Cumulative report is issued each pay cycle and provides employee leave status information for each position.	FE+3		FE+3			
3.4.003	A-P-16	Less Than Full-Time Worked Reports Dates and hours	4		4	40 TAC 815.106(i)		
3.4.006	A-P-12	Time Cards and Time Sheets	4		4	40 TAC 815.106(i)		

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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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 31 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired						
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			

3.4.007	A-P-7	Employee Leave Requests	FE+3		FE+3			
3.4.008	A-P-14	Sick Leave Pool Documentation Requests submitted, approvals, number of hours transferred in and out, etc.	FE+3		FE+3			
4.1.001	B-A-33	Accounts Payable Information	FE+3		FE+3			
4.1.003	B-A-22	Cancelled Checks/Stubs/Warrants/Drafts	FE+3		FE+3			
4.1.004	B-A-34	Encumbrance Detail	FE+3		FE+3			
4.1.005	B-A-3	Inventory and Other Cost Files Production, job, labor, quotes Pricing, specifications, etc.	FE+3		FE+3			
4.1.006	B-A-35	Investment Transaction Files	FE+3		FE+3			
4.1.007	B-A-36	Budget Transfers/Revisions Transfers or adjustments to budgets.	FE+3		FE+3			
4.2.001	B-A-10a	Cash Deposit Vouchers Cash deposit slips.	FE+3		FE+3			
4.2.002	B-A-10b	Cash Receipts Includes receipts for fees (permits, licenses, renewals, etc.).	FE+3		FE+3			
4.2.003	B-A-37	Daily Cash Receipts Logs	FE+3		FE+3			

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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 32 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired							
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				
4.2.005	B-A-7	Purchase Vouchers Requisitions, orders, receiving reports, invoices, or statements, change orders, best value determinations, etc.	FE+3		FE+3				
4.2.006	B-A-4	Journal Vouchers	FE+3		FE+3				
4.2.007	B-A-8	Travel Vouchers/Travel Advances Travel, payroll, etc.	FE+3		FE+3				
4.3.002	B-A-12a	Revenue Reports	FE+3		FE+3				
4.3.003	B-A-12b	Expenditure Reports	FE+3		FE+3				
4.4.001	B-A-2	General and Subsidiary Ledgers	FE+3		FE+3				
4.4.002	B-A-9	Accounts Receivable Ledgers	FE+3		FE+3				
4.5.002	B-A-11	Internal Fiscal Management Reports Includes agency monthly budget reports	FE +3		FE+3				

Retention Codes (Field 7)						Archival Codes (Field 8)				
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STATE OF TEXAS

Records Retention Schedule

SLR 105

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1. Page 33 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired						
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			Agency	Storage	Total			
4.5.003	B-A-1	Annual Financial Reports Required by the General Appropriations Act (100 Day Report).	AC+6		AC+6	AC= September 1 of odd-numbered calendar years. CAUTION: If an agency does not produce a biennial or annual narrative report as described in item number 1.1.066, then these annual financial reports must be marked with Archival Code A. The archival requirement, when a biennial or annual narrative report is not produced, is met by sending the required copies of the reports to the Texas State Publications Depository Program, Texas State Library and Archives Commission.		
4.5.005	B-A-38	External Fiscal Reports Special purpose – i.e. federal financial reports, salary reports, etc. Includes HUB Reports.	FE+3		FE+3			

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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 34 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired							
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			Agency	Storage	Total				
4.5.006	B-A-39	Annual Operating Budgets Required by the General Appropriations Act.	FE+3		FE+3				
4.6.002	B-A-14	Reconciliations	FE+3		FE+3				
4.7.001	B-A-40	Accounting Policies and Procedures Manual	US+3		US+3				
4.7.002	B-A-41	Bank Statements	FE+3		FE+3				
4.7.003	B-A-42	Returned Checks (Uncollectable)	AC+3		AC+3		AC=After determined uncollectable.		
4.7.004	B-A-43	Capital Asset Records	LA+3		LA+3				
4.7.006	B-A-17	Comptroller's Statements	FE+3		FE+3				
4.7.007	B-A-44	Chart of Accounts One for all accounts in use for a fiscal year.	FE+3		FE+3				

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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 35 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired						
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			Agency	Storage	Total			
4.7.008	B-A-19	Federal Grant Records	AC+3		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.		
4.7.009	B-A-45	Fixed Assets Reports	US+3		US+3			

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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 36 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired						
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			Agency	Storage	Total			
5.1.001	B-M-1	Contracts and Leases Contracts, leases, and agreements include general obligation, land lease, utilities, and construction except for buildings. Documents include specifications, affidavits of publication of calls for bids, accepted bids, performance bonds, contracts, purchase orders, inspection reports, and correspondence.	AC+4		AC+4	AC=Expiration or termination of the instrument according to its terms.		
5.1.005	O-SS-4	Postage Records Records and reports of postage expenses, including postal meter usage.	FE+3		FE+3			
5.2.001	B-A-46	Appraisals, Building or Property	AV		AV	R		
5.2.002	O-A-1	Construction Project Files Planning, design, and construction records; accepted and rejected bids; correspondence, etc.	AC+10		AC+10	R	AC=Completion of project. SEE ALSO item number 5.2.003.	

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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 37 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired							
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				
5.2.003	O-A-2	Building Plans Includes architectural and engineering drawings, profiles, and blueprints.	State Owned: LA Leased: AC+2		State Owned: LA Leased: AC+2	R (state owned only)	AC: For leased building, AC = Termination or cancellation of lease. SEE ALSO item number 5.2.002. ARCHIVES NOTE: Archival review designation is for state-owned buildings only.		
5.2.007	B-A-47	Damage Reports Reports of damage to state property.	FE+3		FE+3				
5.2.014	B-A-15a	Annual Property Inventory Property, equipment, supply verification.	FE+3		FE+3				
5.2.017	B-A-48	Lost/Stolen Property Reports	FE+3		FE+3				
5.3.008	B-P-1	Purchasing Logs Log, register, etc., providing a record of purchase orders issued, orders received, and similar data on procurement status.	FE+3		FE+3				

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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 38 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired						
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			
5.4.001	O-A-31	Accident Reports 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		CE+5	29 CFR 1904.33. The Texas Department of Insurance retains copies of the reports submitted to it for 50 years.		
5.4.003	O-A-3	Safety Inspection Records Fire, safety, and other inspection records of agency facilities and equipment.	AC+3		AC+3	AC=Inspection, or date of the correction of the deficiency if the inspection report reveals a deficiency. CAUTION: Does not include inspection reports of building construction.		
5.4.010	O-A-32	Material Safety Data Sheets	AC		AC	AC=After sheets are updated or hazardous chemical no longer stored by agency, as applicable.		

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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 39 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired						
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			
5.4.012	O-M-2	Security Access Records Records relating to the issuance of keys, identification cards, building passes, passwords, signed statements or similar instruments of access to agency or state facilities, equipment or automated systems.	AC+2		AC+2	AC=Until superseded, date of expiration, or date of termination, whichever sooner.		
5.6.003	O-SS-31	Vehicle Maintenance Records	LA+1		LA+1			
5.6.004	O-SS-2	Driving Records	AC		AC	AC=Until superseded or employment termination.		
5.6.005	O-SS-1	Vehicle Mileage Reports Includes mileage, fuel/oil consumption, passengers carried and other related operational information.	FE+3		FE+3			
5.6.007	O-SS-32	Vehicle Titles	LA		LA			

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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 40 of 41

2. Agency Code 771		3. Agency Name Texas School for the Blind and Visually Impaired						
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			
6.1.001	AR-1	Student Record Working Files including 1) Application, Record Release Requests, Enrollment Information (Address, Phone Numbers, Local School District of Residence), Full & Individual Evaluation (most recent), FIE Eligibility Reports for Disability Eligibility Annual ARD Committee Documents (most recent), Graduation/Dismissal ARD Documents (if different from Annual), AAR, Eye Exam (oldest and latest), Low Vision Evaluation (if applicable), Social History (Social Worker's Intake Report), Psychological-Intellectual Evaluation (most recent), Psychiatric Evaluation (if applicable), Immunization Record, Birth Certificate, Social Security Document, Guardianship document (if applicable) 2) enrollment lists and rosters; 3) records maintained pursuant to the Individuals with Disabilities Education Act; 4) records maintained pursuant to any state requirement contained in the Texas Education Code; and 5) health and medical records; and 6) any other record maintained during a student's enrollment	AC	7	AC+7	AC = July 15 of the calendar year following 1) the student's graduation from high school or 2) the date of the student's ineligibility for services under the Individuals with Disabilities Education Act. Retention pursuant to 34 CFR 75.73, 75.734, 300.573 With respect to column three description: 1) records will be digitized; 2) records will be maintained without time limitation in student electronic data base	10-771-001	

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STATE OF TEXAS

Records Retention Schedule

SLR 105

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1. Page 41 of 41

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			Agency	Storage	Total			
6.1.002	AR-2	Student Health and Related Services (SHARS) documentation	AC+1	6	AC+7	AC = July 15 of the calendar year during which the record was created	15-771-002	
6.1.003	AR-3	Student Permanent File including 1) Application, Record Release Requests, Enrollment Information (Address, Phone Numbers, Local School District of Residence), Full & Individual Evaluation (most recent), FIE Eligibility Reports for Disability Eligibility Annual ARD Committee Documents (most recent), Graduation/Dismissal ARD Documents (if different from Annual), AAR, Eye Exam (oldest and latest), Low Vision Evaluation (if applicable), Social History (Social Worker's Intake Report), Psychological-Intellectual Evaluation (most recent), Psychiatric Evaluation (if applicable), Immunization Record, Birth Certificate, Social Security Document, Guardianship document (if applicable)	PM		PM	This is a digitized portion of the student record AR-1 that will be kept permanently.		

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