

October 19, 2023



Peter L. Bailey
Superintendent
Texas School for the Deaf
1102 S. Congress Ave.
Austin, TX 78704

Dear Peter L. Bailey ,

The 7th recertification of your agency's records retention schedule is approved for use as of **10/12/2023**, and it may be accessed on our website at <https://www.tsl.texas.gov/slrn/state/schedules>. Please ensure that all old copies of the schedule are superseded with this certified copy.

Lorenzo de Zavala
State Archives and
Library Building

1201 Brazos Street
Austin, Texas
78701

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

www.tsl.texas.gov

Commission Chair
Martha Wong

Members
David C. Garza
F. Lynwood Givens
David Iglesias
Arthur T. Mann
Bradley S. Tegeler
Darryl Tocker

Director and Librarian
Gloria Meraz

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

Each agency schedule must be reviewed, updated, and submitted for recertification according to a timeline established by the Texas State Library and Archives Commission. Your next recertification is scheduled for **November 2028**.

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:

Rebecca Hanna
512-463-5494
rhanna@tsl.texas.gov

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

Sincerely,

A handwritten signature in black ink, appearing to read "C. Kelso".

Craig Kelso
Director and State Records Administrator

cc: Agency head

TSLAC

Preserving yesterday
Informing today
Inspiring tomorrow



STATE OF TEXAS

Records Retention Schedule Certification

SLR 105C

Form SLR 105 or SLR 122 must accompany all submissions of this form.

Section 1. Agency Information

(Submitting agencies complete this section only)

Agency Code 772

Agency Name Texas School for the Deaf

(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

Claire Bugen

Name (Print or type)

Claire Bugen

Date

4-28-21

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

Gloria Perez

Name (Print or type)

Gloria Perez

Date

10/12/2023

Cert/Recert No.

7

Amendment No.

CAUTION

A state record with an expired retention period may not be destroyed if any litigation, claim, negotiation, audit, public information request, administrative review, or other action involving the record is initiated; its destruction shall not occur until the completion of the action and the resolution of all issues that arise from it.

A state record with a retention period that expires during any litigation, claim, negotiation, audit, public information request, administrative review, or other action involving the record may not be destroyed until the completion of the action and the resolution of all issues that arise from it.

Amendment Note: If this schedule is amended at any point after certification, updated records series will be indicated by an asterisk (*) preceding the Agency Item Number (AIN).

State and Local Records Management Division
Texas State Library and Archives Commission
(Rev. 7/20)





STATE OF TEXAS
Records Retention Schedule

SLR 105
 Rev. 2021-07

Retention Codes (field 7)

AC – See field 9 for specific records series definition
 AV – Administratively valuable
 CE – Calendar year end

FE – Fiscal year end
 LA – Life of Asset
 PM – Permanent
 US – Until Superseded

Archival Codes (Field 10)

A/I – Transfer to State/University Archivist
 R/O – Review by State/University Archivist
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1. Agency Code:			2. Agency Name:								
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				
ARO 1		Prospective Student Files		AC	1			AC = When student first applies for admission to Texas School for the Deaf, or three years after admission is denied or last contact takes place.			
ARO 3		Student Cumulative Files		AC	7			AC = When student leaves school or no longer eligible to attend Texas School for the Deaf.			
ARO 4		Permanent Student Record	Student's name, address, telephone number, grades, attendance information, classes attended, and grade level and year completed, achievement test scores (Transcript or Academic Achievement Record); record of access to student information; original enrollment form, most recent ARD and IEP; Most recent comprehensive evaluation; audiological & otological report; psychological summary; statement of comment on contested information if such information is part of the Permanent Student Records.	PM							



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ASB 01	4.1.001	Accounts Payable Information	Claims; invoices; statements; copies of checks and purchase orders; expenditure authorizations; ledgers; encumbrance, purchase, general journal, expenditure, and special vouchers; and similar records that serve to document disbursements, including those documenting claims for and reimbursement to employees for travel and other expenses.	FE	3				R	Review for placement in agency archives. General and subsidiary ledgers; encumbrance records; canceled checks; travel vouchers; cash receipts; cash receipt log; reconciliation; trial balances; vendor files; purchasing; expenditures; cash records; money received through the mail log	
ASB 02	4.1.009	Accounts Receivable Information	Bill copies or stubs, statements, billing registers, account cards, deposit warrants, cash receipts, credit card receipts, receipts books, cash transfers, daily cash reports, reconciliations, general journal vouchers, special vouchers, and similar records that serve to document money owed to or received by a state agency and its collection or receipt.	FE	3						



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ASB 03	4.7.008 a	Grant Records-Awarded	This series documents state, federal, and other sponsored 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	4			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 funding agency. Records in this series may be subject to Government Code 441.1855. Agencies must ensure that records are retained for the appropriate retention period.	
ASB 05	4.8.001	Banking Records	Bank statements, credit card statements, cancelled checks, check registers, deposit slips, debit and credit notices, reconciliations, and other banking related records.	FE	3						
ASB 13	5.2.006	Inventory and Property Control Records	Records documenting the inventorying, maintenance, usage, and disposal of supplies, equipment, and property of a state agency. Includes lost, stolen, and damage reports. Inventory sheets; property transfer files; surplus property records; supply usage records; check-out logs; invitation for bids; property acquisition exchange notice.	FE	3					See RSIN 5.2.008 for the maintenance logs of individual pieces of equipment.	



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ASB 16	5.3.007 a	Bid Documentation – 9/1/2015 and After	Includes bid requisition/authorizations, invitations to bid or propose, bid specifications, awarded and unawarded bids, and bid tabulation /evaluations. 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.		SB20 (84th Leg.)	
ASB 17	5.3.007 b	Bid Documentation – 8/31/2015 and Prior	Includes bid requisition/authorizations, invitations to bid or propose, bid specifications, awarded and unawarded bids, and bid tabulation /evaluations. Associated with a contract executed, renewed, or amended on or before August 31, 2015.	FE	3					SB20 (84th Leg.)	
ASB 18	4.5.002	Fiscal Management Reports	Internal and external periodic fiscal management reports and associated worksheets, including federal financial reports, salary reports, HUB reports, investment performance reports, etc.	FE	5					Comptroller reports; fiscal work papers CAUTION: This series does not include fiscal reports created to fulfill grant requirements. See RSIN 4.7.008.	



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ASB 19	5.2.002	Construction Records	Project records related to planning, design, construction, conversion, or modernization of state facilities, structures, infrastructure, and systems, including feasibility, screening, and implementation studies; topographical and soil surveys and reports; as-builts; laboratory test reports; environmental impact statements; correspondence; successful and unsuccessful bid documentation and other related documentation.	AC	10			AC = Completion of project.	R	SEE ALSO item numbers M 1.1, FP 2 and ASB 16. See RSIN 5.2.003a/b and 5.2.028 for further retention of completed building documentation. See RSIN 5.3.007a/b for additional bid documentation retention periods, including RSIN 5.3.007c for invalid bids that do not meet agency submission requirements. ARCHIVES NOTE: Archival review designation is for state-owned buildings only.	
ASB 20		School Lunch Records		AC	5			AC= End of program year		Refer to TSLAC local schedule SD3460-06 for guidance to retention requirements. Any citations should be followed	
ASB 21	3.2.004	Payroll Changes	Used to make increases or decreases to employees' gross pay, FICA, retirement, or in the computation of taxes.	FE	4					29 CFR 516.6(c).	
ASB 23	3.2	Prior State Service	Employees who have worked at other agencies in the state of Texas.	AC	4			AC = After termination of employment or after amendment, expiration, or termination of authorization, whichever sooner.		Series includes 3.2.001, 3.2.002, 3.2.003, 3.2.009	



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ASB 24	3.2.002	Payroll Reports	Payroll records and registers documenting employee earnings, wages, and pay. This may include but is not limited to payroll input records, summary statements, payroll vouchers, payroll detail sheets, and payroll history.	FE	4						40 TAC 815.106(i).
ASB 25	3.4.008	Sick Leave Pool Subsidiary Ledger	Records documenting number of hours transferred in and out of comprehensive sick leave pool.	FE	3						
ASB 27	3.4.006	Time and Attendance Records	Records documenting individual employee's hours worked, including work schedules and documentation evidencing adherence to or deviation from normal hours for those employees working on fixed schedules.		4					Pertains to paper versions maintained within Human Resources. Maintained electronically in CAPPs.	40 TAC 815.106(i).
ASB 28	3.2.005	W-4 Forms	Employer's copy of "Employee's Withholding Exemption Certificate."	AC	4			AC = Until superseded, obsolete, or upon separation of employee.		Pertains to paper versions maintained within Human Resources.	26 CFR 31.6001-1(e)(2).
ASB 29	3.2.003	Federal Tax Records	Includes 1099, W2, FICA, and other tax records.	AC	4			AC = Tax due date, date claim is filed, or date tax is paid whichever is later.		Maintained in HR by payroll.	26 CFR 31.6001-1(e)(2).
ASB 30	3.2.001	Deduction Authorizations	Documentation used to start, modify, or stop all voluntary or required deductions from payroll, including garnishment or other court-ordered attachments.	AC	4			AC = After termination of employee or after amendment, expiration, or termination of authorization, whichever is sooner.		Maintained in HR by payroll	



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ASB 31	3.2.008	Direct Deposit Application/Authorizations	Forms used to deposit employee's earnings into a specified personal account.	AC				AC= Until superseded, cancelled, or last payment deposited after termination of employment, whichever applicable.		Pertains to paper versions maintained within Human Resources. Maintained electronically in CAPPS.	
ASB 35	4.1.006	Investment Companies	Records documenting the investment of any public funds that evidence the investment of such funds, the cancellation or withdrawal of investments, and similar activities.	FE	5					Vendor information.	
ASB 39	4.4	Student Trust Funds Subsystem		FE	7					Contains student banking information.	
ASB 41	4.7.004	Real Property Inventory, Capital Improvement	Documentation relating to the capital and fixed assets of a state agency, including equipment or property history cards containing data on initial cost, depreciation schedules or summaries used for capital outlay budgeting, and property sale, auction, or disposal records of agency owned equipment and property.	LA	3						
ASB 47	5.6.007	Vehicle Titles And Registrations	Vehicle titles, registration information, and owner manuals for state vehicles.	LA							
ASB 48	5.4.010	Material Safety Data Sheets	Safety Data Sheets (SDS) that list information relating to occupational safety and health for the use of various substances and products.	AC				AC = After sheets are updated or hazardous chemical no longer stored by agency, as applicable.		CAUTION: If Workplace Chemical Lists (RSIN 5.4.009) are not maintained, these records must be maintained for 30 years.	29 CFR 1910.1020(d)(1)(ii)(B)



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ASB 49	3.3.022	Texas Workforce Commission Reports	Reports to the agency from TWC or its predecessor pertaining to employees.		3						
ASB 50	1.2.001	Destruction Authorizations	Documents authorizing final disposition of records under a certified records retention schedule. Records may also include destruction authorizations (e.g. form RMD 102) approved by Texas State Library and Archives Commission.		3					CAUTION: If destruction authorizations are maintained as part of RSIN 1.2.010 (Records Disposition Logs), then longer retention period applies.	



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ASB 52	4.5.003	Annual Financial Report	Annual Financial Reports (AFR) required by the General Appropriations Act (100 Day Report).	AC	6			AC = September 1 of odd-numbered calendar years.		<p>ARCHIVES NOTE: The final version of Annual Financial Reports must be submitted to the Texas State Publications Depository Program per 13 TAC 3.3(a)(2)(a). Working files and related documentation used in creating the final plan are not subject to archival review and may be disposed of at the expiration of the retention period.</p> <p>CAUTION: If an agency does not produce a biennial or annual narrative report as described in RSIN 1.1.066, then these annual financial reports must be marked with Archival Code A. The archival requirement, when a biennial or annual narrative report is not produced, is met by sending the required copies of the reports to the Texas State Publications Depository Program, Texas State Library and Archives Commission.</p>	



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ASB 53	5.1.001	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, performance bonds, contracts, purchase orders, inspection reports, and correspondence. May also include other applicable documentation in the master contract file per Texas Comptroller of Public Accounts Contract Management Guide.	AC	7			AC = Expiration or termination of the instrument according to its terms.		SEE FP 2 for building construction contracts. See RSIN 5.1.017 for contract logs	Government Code, 441.1855.
ASB 54	5.1.017	Contract Log	List of agency contracts, leases, and agreements, including general obligation, land lease, utilities, and construction contracts.	FE	3						



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ASR 01	1.1.013	Calendars, Appointment and Itinerary Records	Calendars, appointment books or programs and scheduling, or itinerary records maintained by staff during business hours that document appointments, itineraries, and other activities of agency officials or employees.	CE	1				R	<p>ARCHIVES NOTE: Only the calendars, appointment, and itinerary records of elected officials, agency heads, and board or commission members require archival review. Contact the State Archives when these records have met their retention periods.</p> <p>CAUTION: A record of this type purchased with personal funds, but used by a state official or employee to document his or her work activities may be a state record and subject to this retention period. See Open Records Decision 635 issued in December 1995 by the Attorney General.</p> <p>Calendar, appointment records stored on Google. Including Board member files.</p>	



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ASR 02	1.1.014	Legal Opinions and Advice	From agency legal counsel or the Attorney General, including any requests eliciting the opinions.	AV					R	CAUTION: Does not include legal opinions or advice rendered on a matter in litigation or with regard to pending litigation, or opinions rendered for Public Information Act Requests. See RSIN 1.1.048, 1.1.020, and 1.1.021. ARCHIVES NOTE: Opinions and advice that set legal precedent or exhibit historical value will be evaluated by the Archives and Information Services Division of the Texas State Library and Archives Commission for archival preservation. See page ix for additional guidelines.	
ASR 03	1.1.020	Public Information Requests - Not Exempted	Includes all correspondence and documentation relating to requests for records that are furnished to the public under the Public Information Act (Chapter 552, Government Code). Also includes withdrawn requests.	AC	1			AC = Date request fulfilled or withdrawn.		Maintained by PIO (Public Information Officer)	



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ASR 04	1.1.021	Public Information Requests - Exempted	Includes all correspondence and documentation relating to requests for records that are excepted under the Public Information Act (Chapter 552, Government Code), including records provided to the legislature under section 552.008.	AC	2			AC = Date of notification that records are exempt.		Maintained by PIO	
ASR 05	1.1.023	Organization Charts	Charts or diagrams that show the structure of an agency and the relationships and relative ranks of its departments and job positions.	US					A	ARCHIVES NOTE: Only charts showing the overall arrangement and administrative structure of the state agency need to be transferred to the Archives and Information Services Division, Texas State Library and Archives Commission. Organizational charts showing division/department level detail are not considered archival.	



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ASR 06	1.1.057	Transitory Information	Records of temporary usefulness that are not an integral part of a records series of an agency, that are not regularly filed within an agency's recordkeeping system, and that are required only for a limited period of time for the completion of an action by an official or employee of the agency or in the preparation of an ongoing records series. Transitory records are not essential to the fulfillment of statutory obligations or to the documentation of agency functions. See page xii for examples.	AC				AC = Purpose of record has been fulfilled.		CAUTION: Records management officers should make certain records 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 signoffs (RSIN 1.2.001) or in records disposition logs (RSIN 1.2.010), but agencies should establish procedures governing disposal of these records as part of its records management plan (RSIN 1.2.014).	
ASR 07	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.		See RSIN 1.1.064 for documentation used to produce reports on agency performance measures. Maintained in accounting.	



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ASR 08	1.1.070	Agency Rules, 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. Includes working files and related documentation used in creating rules, policies, and procedures.	AC	3			AC= Until superseded, or termination of program, rules, policies, or procedures, whichever applicable.	R	ARCHIVES NOTE: Working files and related documentation used in creating the final rules, policies, and procedures, are not subject to archival requirement and may be disposed of at the expiration of the retention period.	
ASR 10	2.1.008	Computer Hardware Documentation	Records documenting operational and maintenance requirements of computer hardware such as operating manuals, hardware/operating system requirements, hardware configurations, equipment control systems, and associated processing files.	AC				AC = Until electronic records are transferred to and made usable in a new hardware environment or there are no electronic records being retained to meet an approved retention period that require the hardware to be retrieved and read.		CAUTION: Hardware needed for access to electronic records must be retained for the period of time required to access the records.	13 TAC 6.94.
ASR 11	3.1.018	Grievance Records	Records relating to the review of employee grievances or complaints 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 EX 03.	



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ASR 12	3.2.009	State Deferred Compensation Records	Records documenting the amount of pension or deferred compensation earned by individual employees.	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.	
ASR 13	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						
ASR 14	3.4.002	Leave Status Reports	Cumulative report is issued each pay cycle and provides employee leave status information for each position.	FE	3						
ASR 15	3.4.004	Overtime Schedules and Authorizations	Records created to schedule time worked by employees outside of or in addition to their regular working hours, including approval authorizations.	FE	4					This information is maintained in CAPPS. CAUTION: Only includes overtime schedules and authorizations. See RSIN 3.4.006 for timekeeping records.	
ASR 16	3.4.007	Time Off and/or Sick Leave Requests	Requests and authorizations for vacation, compensatory, sick, Family and Medical Leave Act (FMLA), sick pool leave, and other types of authorized leave, and supporting documentation.	FE	3					TSD information: This information is maintained in CAPPS.	Government Code, Section 661.152(d); 29 CFR 825.500(b).



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ASR 20	4.7.004	Capital Asset Records	Documentation relating to the capital and fixed assets of a state agency, including equipment or property history cards containing data on initial cost, depreciation schedules or summaries used for capital outlay budgeting, and property sale, auction, or disposal records of agency owned equipment and property.	LA	3						
ASR 22	5.4.013	Continuity of Operations Plans (COOP)	Plans developed (per Texas Labor Code, 412.054) to mitigate the damage of potential events that could endanger an agency's ability to function. Includes disaster preparedness, response, and recovery plans.	US						See RSIN 5.4.017 for records related to responding or recovering from an emergency.	
ASR 24	5.4.017	Emergency Response and Recovery Records	This series documents the events and damages to institutional property due to storms, riots, fires, droughts, floods, and other events affecting citizens and facilities within the jurisdiction of the institution. This series may include but is not limited to: diaries; logs; reports; photographs; notes which indicate or document what happened, when, and where; and related documentation and correspondence.		3				R	<p>See RSIN 5.4.013 for Continuity of Operations Plans (COOP).</p> <p>CAUTION: If grant monies are received to assist with the response or recovery, the retention requirements for this series may vary depending on the specific funding agency.</p>	



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AT 1		Public Education Information Management System (PEIMS) Data Submissions		AC	5			AC= Date of PEIMS submissions.			
AT 2		Data Verification Reports	Data printouts or reports from the Texas Education Agency (TEA) or other agencies provided for informational purposes showing data received and entered in Texas Education Agency (TEA) or other agency databases. For example, reports sent by Texas Education Agency (TEA) or an educational service center showing data received and entered as the result of Public Education Information Management System (PEIMS) data submissions fall under this record group as well as any retained copies of data verification reports returnable to Texas Education Agency (TEA), such as forms used to confirm and/or update data for the Texas School Directory.	AV						Retention Note: Records management officers should use caution in assigning this record series to records of a local government to make certain they are not part of another records series listed in this schedule or, for records series unique to a government, are not part of a records series that documents the fulfillment of the statutory obligations of the government or the documentation of its functions. Refer to TSLAC local schedule SD3600-02 for guidance to retention requirements. Any citations should be followed.	



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AT 3		Surveys	Surveys, questionnaires, opinion polls, and similar documents received from the Texas Education Agency or other agencies, completed and returned by the superintendent or other school official, and used by the surveying agency for the preparation of needs assessments or statistical reports and not for the specific purpose of monitoring compliance with a required or grant-funded program in the respondent district. 1) Education Service Centers 2) School districts	AV	5					Refer to TSLAC local schedule SD3600-03 for guidance to retention requirements. Any citations should be followed	
AT 4		Attendance Reports	Daily Registers of Pupil Attendance (or an equivalent locally-designed record) and similar daily or periodic reports used to document the attendance and absence of students.	AC	5			AC = After entry of grades in academic achievement or cumulative record.		Refer to TSLAC local schedule SD3275-02b for guidance to retention requirements. Any citations should be followed. Maintained in powerschool	
AT 5		Principal's And Superintendents' Report Of Pupil Attendance And Contract Hours	Copies of attendance and enrollment reports submitted to the Texas Education Agency, including those term and period reports submitted to the superintendent by principals for the purposes of compiling state-mandated reports.		5					Maintained in powerschool. Refer to TSLAC local schedule SD3275-02a for guidance to retention requirements. Any citations should be followed	



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AT 6		Teacher Grade Books	Instructor's records documenting individual grades earned by a student and any corresponding average(s) of individual grades used to make entries in the academic achievement or cumulative record.	AC	1			AC = End of school year.		Refer to TSLAC local schedule SD3325-02 for guidance to retention requirements. Any citations should be followed. Maintained in powerschool.	
AT 7		Student Schedules				5				Maintained in powerschool.	
AT 8		Absence Reports	Daily Registers of Pupil Attendance (or an equivalent locally-designed record) and similar daily or periodic reports used to document the attendance and absence of students.	AC	5			AC = End of school year.		Refer to TSLAC local schedule SD3275-02b for guidance to retention requirements. Any citations should be followed. Maintained in powerschool	
AT 9		Student Attendance Files				5				Maintained in powerschool	
AT 10		Attendance Office Supporting Files	Supporting documentation: documents excusing students for attending sports, tests or other activities; absence reports; rolls; warning letters; attendance summary sheets.	AC	5			AC = After student is no longer eligible to attend.		Maintained in powerschool	
AT 11		Population And Average Daily Attendance Reports		FE	5						
ATH 1		Athletic Awards		PM							
ATH 2	1.1.063	Booster Club Records	Meeting attendance and agenda records.	AC	1			AC = End of school year.			



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ATH 3		University Interscholastic League Records	Correspondence, schedules, rosters, reports, records of participation, and similar documentation, except financial records (see Local Schedule GR), concerning the participation of a district in academic, music, and athletic contests and programs governed by the University Interscholastic League.	AV	2					Refer to local schedule SD3625-04 for guidance to retention requirements. Any citations should be followed.	
ATH 4		Sport Videos		AV						Video Tape.	



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BD 1	1.1.058	Open Meeting Agendas & Minutes	Agendas and minutes of state boards, committees, commissions, and councils that conduct open meetings as required by Chapter 551, Government Code.	PM					A	<p>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.</p> <p>CAUTION: This records series and item numbers BD 2 and BD 5 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.</p> <p>Including Board member files.</p>	
BD 2	1.1.059	Meetings, Certified Agendas or Tape Recordings of Closed	Certified agendas or tape recordings of closed meetings of state boards, commissions, committees, and councils.	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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BD 4	1.1.026	Texas Register Submissions Including Open Meeting Notices	Texas Register Submissions, including Open Meeting Notices.	AC	1			AC = Date of Publication in Texas Register.			
BD 5	1.1.062	Meetings- Supporting Documentation	Documents submitted at meetings of state boards, commissions, committees, and councils, including exhibit items, documentation for agenda items, public comment forms, etc. Includes documents sent in advance of meetings for briefing purposes, some of which may not be submitted at an actual meeting.		2				A	See caution comment at RSIN 1.1.058. This includes Board member files.	
BD 7	1.1.002	Internal Audits and Internal Audit - Working Papers		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.	
BD 9		Accreditation Reports	Accreditation Reports for Texas Education Agency, Conference of Educational Administrators of Schools & Programs for the Deaf	PM					R	Refer to local schedule SD3425-01b for guidance to retention requirements. Any citations should be followed.	
BH 3		Student Identifications		AV						Photograph.	



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CG 1		Student Guidance and Counseling Files	Individual student counseling files maintained by school counselors, including parental conference reports.	AC				AC = When student graduates or is no longer eligible to attend Texas School for the Deaf.		Refer to local schedule SD3350-02 for guidance to retention requirements. Any citations should be followed. Retention Note: Guidance and counseling records created by participation in special programs described in Part 3 of this schedule must be retained for the same period as Student Records in the appropriate section. If the records created in a federally funded project or program, the retention period is instead cessation of services + 5 years.	
CG 3	1.1.069	Counseling And Guidance Workload Records	Workload reports.		1						



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EX 02	1.1.004	Legislative Appropriation Requests (LAR)	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 final version of Legislative Appropriation Requests must be submitted to the Texas State Publications Depository Program per 13 TAC 3.3(a)(3)(A). Working files and related documentation used in creating the final plan are not subject to archival review and may be disposed of at the expiration of the retention period.	
EX 03	1.1.048	Litigation Files	Records created by or on behalf of an agency in anticipation of or in the adjudication of a lawsuit.	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. See page ix for more information.	



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EX 04	1.1.066	Annual Report	Annual narrative reports to the governor and legislature as required by an agency's enabling statutes, including annual narrative reports if they are required by statute. Includes working files and related documentation used in creating final report.	AC	6			AC = September 1 of odd-numbered calendar years.		ARCHIVES NOTE: The final version of these agency reports must be submitted to the Texas State Publications Depository Program per 13 TAC 3.3. The requirement is met by sending the required copies of the reports to the Texas State Publications Depository Program, Texas State Library and Archives Commission. Working files and related documentation used in creating the final report may be disposed of at the expiration of the retention period.	
EX 07		Volunteer Records		AC	5			AC = Upon employee termination.		Series includes records fitting to 1.1.078.	
EX 10	1.1.019	Public Relations Records	News, press releases, marketing files and collateral, or any public relations files maintained or issued by an agency. Includes print, electronic, audio, and audiovisual records.		2				R		



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EX 15	1.3.002	Publication Development Files	Physical and digital development and design files used to create State Publications, including but not limited to background material, copy (drafts), original artwork, photo negatives, prints, flats, etc. This includes all work performed both inside and outside the agency.	AV					R	See RSIN 1.3.001 for final State Publications created from development files. ARCHIVES NOTE: Successive and substantive drafts of major publications may be archival. Major is defined by both the publication's authorship and its impact on Texas and Texans. Original artwork, including photo prints and negatives that have significant value as evidence of agency programs as well as the potential for re-use, may be archival.	
EX 16	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 (SAO) retains any copies of its audits performed on Texas state agencies. See RSIN 5.4.018 for Audit Plan records. See BD 7.	



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EX 16.1	1.1.055	Strategic Plans	Operational strategic plans, which include descriptions of information resources programs, prepared in accordance with Government Code, 2054.095 and 2056.002. Includes working files and related documentation used in creating the final plan.	AC	6			AC = September 1 of odd-numbered calendar years.		ARCHIVES NOTE: The final version of Strategic Plans must be submitted to the Texas State Publications Depository Program per 13 TAC 3.3(a)(2)(C). Working files and related documentation used in creating the final plan are not subject to archival review and may be disposed of at the expiration of the retention period.	
FP 2	5.2.028	Building Construction Contract and Inspection Records	Building construction contracts, surety bonds, and inspection records.	LA	10				R	SEE ASB 53, ASB 19 and M 1.1.	
FS 2		Menus	Daily menus and related planning records.	FE	5					Refer to local schedule SD3450-06 for guidance to retention requirements. Any citations should be followed	
FS 5	5.4.003	Safety, Drill and Inspection Reports	Fire, safety, and emergency drill, alarm, and other inspection records of agency facilities and equipment, including orders issued by inspectors to correct deficiencies in compliance with any code or regulations.	AC	3			AC = Date of drill, alarm, inspection, or date of the correction of deficiency, whichever applicable.		CAUTION: Does not include inspection reports of building construction. See RSIN 5.2.028. Refer to local schedule SD3450-05 for guidance to retention requirements. Any citations should be followed	



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HC 1		Cumulative Health Card or Record	Health and medical records of students in public school districts.	AC	7			AC = Date of last treatment or patient reaches age 21, whichever later.		By regulation - 22 TAC 165.1(b). Refer to local schedule SD3300-04 for guidance to retention requirements. Any citations should be followed.	
HC 2		Controlled Substance Logs		AC	3			AC = At end of school year.			
HC 3		Employee Medical Treatment Record			5						22 TAC 165.1(b).
HC 4	3.3	Health Center – Lists, Roster, Appointment Books		AC	5			AC = End of school year.		Series includes 1.1.013 and 3.3.020.	
HC 5		Pharmacy Book	Prescription medications for specific students ordered from commercial pharmacy.	AC	3			AC = When book is filled + FE.			
HC 7	1.1	Activity And Statistical Reports	Reports compiled by agency personnel on a daily or other periodic basis pertaining to workload monitoring, task completion times, number of public contacts, and similar activities.		3					CAUTION: If reports are used to document performance measures, see RSIN 1.1.064. Includes RSIN: 1.1.069 and 3.3.010	
HC 8		Special Health Care Records	Logs or reports of medications or treatment administered to students on a group or individual basis.	AC	3			AC = End of school year.		Refer to local schedule SD3300-11a for guidance to retention requirements. Any citations should be followed.	



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INF 1	1.2.005	Records Retention Schedule	A records retention schedule (i.e. form SLR 105) that identifies the records that are created and maintained by an agency, provides the minimum timeframes the records must be retained, and includes instructions for their disposition. This series may include working files and documentation of certification and approval by the Texas State Library and Archives Commission.	US						Original is retained for 50 years by the State and Local Records Management Division, Texas State Library and Archives Commission.	



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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				
INF 2	2.1.009	Hardware and Software Technical Documentation	Records adequate to specify all technical characteristics necessary for reading or processing electronic records; to document modifications to computer programs; to access, retrieve, manipulate, and interpret data in an automated system; and allow for their timely, authorized disposition. Records include but are not limited to: user guides, system or sub-system definitions, system specifications, input and output specifications, system flow charts, program flow charts, program maintenance logs, change notices, data element dictionaries, file layouts, code books or tables, 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: Hardware and software needed for access to electronic records must be retained for the period of time required to access the records.	13 TAC 6.94.
INF 3	2.1.007	Computer Software Programs	Agency-developed automated software applications, operating system files, and associated processing files, including job control language, programs, applications, scripts, source code, etc.	AC				AC = Until electronic records are transferred to and made usable in a new software environment or there are no electronic records being retained to meet an approved retention period that require the software to be retrieved and read.		CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.	13 TAC 6.94.



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INF 4	1.2.010	Records Disposition Logs	Logs or similar records listing records disposed of by an agency, which might include records series title, dates of records, and date of disposition.		10					CAUTION: Disposition can mean destroyed or transferred.	13 TAC 6.94.
INF 5	2.1.002	Master Files and Application Data	Relatively long-lived computer files containing organized and consistent sets of complete and accurate electronic records and associated processing files. Examples include, but are not limited to, data tables of relational databases used by applications or computer programs.	AC				AC = Until electronic records are transferred to and made usable in a new system environment, or there are no electronic records being retained to meet an approved retention period established in this schedule that require the use of the system.		CAUTION: Records management officers must be certain before assigning the retention period of AC to agency master files and application data that the files do not fall under records series listed elsewhere.	
IS 03		Curriculum Guides	A set of high level instruction guidelines that integrate TEKS and standardized testing (STAAR, TAKS) expectations into a broad outline of what will be taught.	US						Refer to local schedule SD3325-01 for guidance to retention requirements. Any citations should be followed	13 TAC 6.94.
IS 04		Lesson Plan Reports		AV							
IS 06		Driver Education Student Records			7					Applies to Adult Driver Education as we have many students over 18 through Summer Camps and Programs and our Access Students-SOC	



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IS 07		Achievement Test Reports	Reports of results of TAAS, TEAMS, TABS, TAKS, STAAR, and other standardized state and national achievement, mental abilities, and aptitude tests reported by score, percentile rank, etc.	AC	1			AC = When recorded on permanent academic achievement record.		Retention Note: a) If testing results of the types described are not recorded on the academic achievement or cumulative record (see item number SD3200-01) either manually or by affixing labels, the results must be retained PERMANENTLY for grades 9-12 and until the date of withdrawal + 5 years for all other grades. b) Test results for K-8 student testing for 9-12 credit, must be retained PERMANENTLY.	
IS 08		Test Results, Misc.		AC	7			AC = When recorded on permanent academic achievement record and/or student is no longer eligible to attend.			
M 1.1	5.2.003 a	Building Plans And Engineering Drawings		LA	25				R	See RSIN 5.2.002 and 5.2.028.	
M 2	5.2.010	Equipment Manuals And Specifications		LA							
M 3	5.2.019	Service Orders	Requests or work orders for repairs or maintenance to facilities, vehicles, or equipment completed by internal agency personnel or external service providers.		1						



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M 4	5.2.011	Equipment Warranties		AC	1			AC = Expiration of Warranty.			
M 5	5.4.003	Safety, Drill, and Inspection Records	Fire, safety, and other inspection records of agency facilities and equipment, including orders issued by inspectors to correct deficiencies in compliance with any code or regulations.	AC	3			AC = Date of drill, alarm, inspection, or date of the correction of deficiency, whichever applicable.		CAUTION: Does not include inspection reports of building construction. SEE item number FP 2.	
M 6	5.6.003	Inspection, Repair and Maintenance Records- Vehicles	Records and documentation related to inspections, repairs, and maintenance for state vehicles.	LA	1					See RSIN 5.2.008 for non-vehicle equipment maintenance records.	



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P 01	3.1	Personnel Files, Non-Teacher	Applications, selection records, service records, appraisals, sign-off's, personnel actions, contracts, correspondence, exit information, pre-employment physicals.	AC	10			AC = Termination.		<p>Note: Service Record goes to record series 3.3.031, Agency Item Number P 19.</p> <p>5 years after termination, the file is considered a Retiree File.</p> <p>Includes RSIN 3.1.002, 3.1.019, 3.1.020, 3.3.001, 3.1.013, and 3.1.014.</p> <p>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 RSIN 3.1.021, all documentation from this series used to support disciplinary action must be retained for the minimum retention period described by RSIN 3.1.021.</p> <p>CAUTION: Does not include criminal history checks; see RSIN 3.1.026.</p> <p>Does not include drug screening test results; see RSIN 3.1.040a/b/c.</p>	<p>29 CFR 1602.31, 29 CFR 30.12(d), 41 CFR 60-1.12(a), Government Code 441.1855.</p>



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					Years	Months	Days				
P 02	3.1	Personnel Files, Teacher	As in P 01, with Service Record, Teacher Certificate, Certificate recommendations, Transcripts, Texas Teacher Appraisal System records.	AC	10			AC = Termination.		Note: Service Record goes to record series 3.3.031, Agency Item Number P 19. 5 years after termination, the file is considered a Retiree File. Includes RSIN 3.1.027 in addition to those included in P 01.	



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					Years	Months	Days				
P 03	3.1.019	Performance Appraisal Records	Records related to evaluating the performance of a teacher. Currently, teachers are evaluated under T-TESS or a locally developed appraisal system as required by Texas Education Code, Chapter 21, subchapter H. This series also includes records in prior systems: the Professional Development and Appraisal System (PDAS) and its local equivalent implemented on a statewide basis in the 1997-1998 school year; the Texas Teacher Appraisal System (TTAS) implemented on a statewide basis in the 1986-1987 school year and used through the 1996-1997 school year for the career ladder appraisal process; and TTAS functional equivalents used in districts for teacher performance appraisals for the 1983-1984, 1984-1985, and 1985-1986 school years.	AC	2			AC= Date of the making of the record.		Retention Notes: For teacher appraisal records prior to the 1983-1984 school year, refer to GR1050-21 in Local Schedule GR for guidance to retention requirements. Any citations should be followed. Refer to TSLAC local schedule SD3575-05 for guidance to retention requirements. Any citations should be followed	
P 04	3.3.011	Employee Service Record Former Employee Service Record	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					Series includes 3.2	

AC = Termination of employment.



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P 07	3.1.001	Employment Application Files - 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.	AC	2			AC= Date of the making of the record or the personnel action involved, whichever occurs later.		CAUTION: Does not include ADA Accommodation Requests. See RSIN 3.1.042.	29 CFR 1602.31 [State Agencies].
P 08	3.1.023	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).	
P 10	3.1.029	Employment Eligibility Verification	Federal reporting form (Form I-9).	AC				AC= 3 years after date of hire or 1 year after termination of employment, whichever is later.		Must be kept at least 3 years from date of hire.	8 CFR 274a.2(b)(2)(i)(A) and (c)(2). 29 CFR 1602.31.
P 11	3.2.006	Wage Rate Tables	Records defining the wage or salary rate for each position in the agency expressed in dollars, grades, or step numbers.		2						29 CFR 516.6(a)(2).
P 13	3.3.004	Benefit Plans	Employee benefit plans such as pension; life, health, and disability insurance; deferred compensation; etc., including amendments.	AC	1			AC= Until superseded or plan terminated.			29 CFR 1627.3(b)(2).
P 14	3.3.015	Positions/Job Classification Review File	Records relating to review and monitoring of job classifications within an agency.	US	3						29 CFR 516.6(a)(2).
P 19	3.3.031	EEO Reports and Supporting Documentation	Includes documentation used to complete EEO (Equal Employment Opportunity) reports.		3						29 CFR 1602.32, 1602.48, and 1602.50.



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					Years	Months	Days				
P 20	3.1	Employee's Medical File	Contains Employee Insurance Records and Physical Examinations/Medical Reports.	AC	5			AC = Until superseded or termination of employment.		Note: Service Record goes to record series P 16 Characteristic Surveys and P 19 EEO Reports. Includes RSIN 3.1.024, 3.1.011 CAUTION: Does not include pre-employment physical examinations. See RSIN 3.1.014. Does not include medical or physical examinations for employees exposed to hazardous materials. See RSIN 5.4.016a/b. CAUTION: Documents that serve as payroll deduction authorizations must be maintained for the retention period prescribed for RSIN 3.2.001.	29 CFR 1602.32, 1602.39, 1602.41, 1602.48, and 1602.50.



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P 21	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 this schedule. Includes reports distributed either internally or to other entities.	AC	3			AC = Date of report.	R	<p>HRIS maintained by the Texas Comptroller's Office.</p> <p>Note for TSD: Human Resource Information System Report</p> <p>See RSIN 1.1.065 for raw data used to produce reports.</p> <p>ARCHIVES NOTE: Reports are archival when they deal with significant aspects of the agency's programs. For agencies that have had an archival appraisal, separate this records series by each type of archival coding, A, R, or E. See page ix for more information.</p>	
P 22	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						



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P 23	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.	
RS 09		Student Log Book	Student activity log that accompanies student in both classroom and residential setting.	AC	3			AC = End of school year.			
RS 16	1.1.070	Agency Rules, 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. Includes working files and related documentation used in creating rules, policies, and procedures.	AC	3			AC = Until superseded or termination of program, rules, policies or procedures, whichever applicable.	R	SEE ALSO: Agency Rules, Policies and Procedures - item number ASR 09. ARCHIVES NOTE: Working files and related documentation used in creating the final rules, policies, and procedures, are not subject to archival requirement and may be disposed of at the expiration of the retention period.	
SC 01	5.4.012	Security Access Records	Key request memos, key assignment logs, security logs, and logs of all activity of security officer on shift.	AC	2			AC = Until superseded, date of expiration, or date of termination, whichever is sooner.			



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SC 02	5.6.005	Vehicle Use Reports	Includes mileage, fuel/oil consumption, passengers carried and other related operational information.	FE	3						
SC 05	5.6.004	License and Driving Record Checks		AC				AC = Until superseded or until termination of employment.			
SC 09	3.3.020	Work Schedules/Assignments	Work, duty, shift, crew, or case schedules, rosters, or assignments.	AV							
SC 12	5.4.011	Visitor Logs		AC	3			AC = End of school year.			
SC 16	1.1.067	T E A Reports & Requests (Non-Fiscal)	Annual, sub-annual, or special reports or studies on non-fiscal aspects of an agency's programs, services, or projects compiled by agency personnel, by advisory committees, or by consultants under contract with an agency that are not noted elsewhere in this schedule. Includes reports distributed either internally or to other entities.		3				R	See RSIN 1.1.065 for raw data used to produce reports. ARCHIVES NOTE: Reports are archival when they deal with significant aspects of the agency's programs. For agencies that have had an archival appraisal, separate this records series by each type of archival coding, A, R, or E. See page ix for more information.	



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SD 1	1.1.043	Training Materials Manuals	Instructional materials and other records developed by an agency associated with training the entities or non-personnel individuals it regulates or serves, including but not limited to training manuals, course registration, class rosters, sign-in sheets, syllabuses, course outlines, and similar training aids used in external training programs.	AC	1			AC = Close of training session, after training materials superseded, or termination of training program, as applicable.		See RSIN 3.3.030 for internal personnel training materials. CAUTION: Does not include hazardous material training records. See RSIN 5.4.007.	
SD 2	3.3.030	Internal Training Administration Records	Records documenting the planning, development, implementation, administration and evaluation of in-house training programs, including but not limited to training manuals, course registration, class rosters, sign-in sheets, syllabuses, course outlines, and similar training aids used in in-house training programs.	AC	2			AC = Close of training session, after training materials superseded, or termination of training program, as applicable.		See RSIN 1.1.043 for external training records. See RSIN 3.1.027 for individual employee training records. CAUTION: Does not include hazardous material training records. See RSIN 5.4.007.	
SD 4	3.1.027	Training and Educational Achievement Records (Individual)	Certificates of completion, certifications, licenses, transcripts, test scores, or similar records documenting the training, testing, certification, licensing, or continuing education achievements of an employee.	AC	5			AC = Termination of employment.			
SF 1	1.1.063	Staff Meeting Minutes and Notes	Minutes or notes, and supporting documentation, taken at internal agency staff meetings.		1						



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SF 2	5.4.007	Hazardous Materials Training Records	Records of training given to employees in an agency hazard communications program. May include but is not limited to date of class, roster of attendees, subjects covered, and instructors.	AC	5			AC = Completion of Staff Training.		See RSIN 3.1.027 for individual employee training records.	Texas Health and Safety Code, 502.009(g).
SF 4	5.4.003	Fire, Safety, Drill, and Inspection Records	Fire, safety, and emergency drill, alarm, and other inspection records of agency facilities and equipment, including orders issued by inspectors to correct deficiencies in compliance with any code or regulations.	AC	3			AC = Date of drill, alarm, inspection, or date of the correction of deficiency, whichever applicable.		CAUTION: Does not include inspection reports of building construction. See RSIN 5.2.028.	
SF 5	5.4.002	Evacuation Plans	Plans for evacuation of agency facilities in cases of emergency.	US							
SF 6	5.4.001	Occupational Accident Reports and Associated Documentation	Accident or occupational disease reports (by supervisors and employees) and other associated reports required to be submitted to the State Office of Risk Management (SORM) 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. See RSIN 5.4.014a/b for non-employee accidents. 29 CFR 1904.33; 28 TAC 120.1(c).	
SL 1	3.3.027	Employee Sign Language Tests, Masters	Aptitude, competency, or skills tests and checklists required of job applicants or of current personnel to qualify for promotion or transfer, including validation records.	US	2					CAUTION: One copy of each different master test (different in terms of either questions or administration procedures) should be retained for the period indicated.	29 CFR 1602.31



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SL 2	3.3.028	Employee Sign Language Test Papers Completed	Completed aptitude, competency, or skills test papers and checklists of job applicants or of current personnel taking a test to qualify for promotion or transfer.		2						29 CFR 1602.31
SL 3	3.3.028	Employee Sign Language Test Tapes			2					Video tape.	29 CFR 1602.31.
SL 4		Sign Class Attendance Records			5					Refer to local schedule SD3275-02b for guidance to retention requirements. Any citations should be followed.	29 CFR 1602.31.
SL 7		Community Sign Class Records		FE	3						
SL 8		Sign Language Instructional Services Data Base	Attendance and grade information for Sign Language classes.	AC	5			AC = End of school year.			
SOC 1	1.1.069	Activity Files	Reports compiled by agency personnel on a daily or other periodic basis pertaining to workload monitoring, task completion times, number of public contacts, and similar activities.		1					Project files, summer camps and programs- generally kept in cloud or on google drive CAUTION: If reports are used to document performance measures, see RSIN 1.1.064.	



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SOC 2	1.3.002	Publication Development Files	Physical and digital development and design files used to create State Publications, including but not limited to background material, copy (drafts), original artwork, photo negatives, prints, flats, etc. This includes all work performed both inside and outside the agency.	AV					R	<p>TSD information: Lonestar. Stored on web and sent to state library. Paper copies in the museum.</p> <p>ARCHIVES NOTE: Successive and substantive drafts of major publications may be archival. Major is defined by both the publication's authorship and its impact on Texas and Texans. Original artwork, including photo prints and negatives that have significant value as evidence of agency programs as well as the potential for re-use, may be archival.</p>	
SW 1		Confirmed Fact-Findings Of Abuse And Neglect At Texas School for the Deaf		AC	7			AC = After student is no longer eligible to attend.		<p>Hard copies of all investigations are kept in a filing cabinet in SW office. Soft copies are submitted and tracked in a database in SOCO</p> <p>CAUTION: If a complaint becomes the subject of litigation, it must be included in and is subject to the minimum retention period of RSIN 1.1.048.</p>	Record required by Texas Family Code 261.003.



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SW 2		Unconfirmed Fact-Finding Of Abuse Or Neglect At TSD		AC	3			AC = End of the school year or six months, whichever is longer.		Hard copies of all investigations are kept in a filing cabinet in SW office. Soft copies are submitted and tracked in a database in SOCO	Record required by Texas Family Code 261.003.
SW 4		Fact -Findings Of Abuse Or Neglect, Not At TSD		AC				AC = After student is no longer eligible to attend.		Hard copies of all investigations are kept in a filing cabinet in SW office. Soft copies are submitted and tracked in a database in SOCO	Record required by Texas Family Code 261.003.
TM 2	5.1	Postal And Delivery Service Records	Mail receipts, postage meter records.	FE	3					Note: 5.1.005 and 5.1.015; i.e., Includes postal records and correspondence tracking records.	Government Code, 441.1855.
TM 4	5.1.004	Telecommunications & Mail Directory		US							
TSD 01	1.1.013	Master Calendar	Includes Weekly Calendar of Facilities Reservations.	AC	2			AC = End of school year.	R	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.	
TSD 02		Activity Requests	Requests for extracurricular activities.	AV							



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TSD 10	5.2.008	Equipment Maintenance Files	Inspection reports, service logbooks, etc.	LA	3					For service agreements or contracts related to equipment repairs and service, retain in accordance with RSIN 5.1.001a/b. For vehicle maintenance records, see RSIN 5.6.003.	
TSD 13	5.1	Parent Contact Logs		AC	1			AC = End of school year.			
TSD 14	1.1.069	Reports, Employee Workload	Reports compiled by agency personnel on a daily or other periodic basis pertaining to workload monitoring, task completion times, number of public contacts, and similar activities.		1					CAUTION: If reports are used to document performance measures, see RSIN 1.1.064.	



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TSD 17	1.3.001	State Publications	One copy of each state publication as defined on page xi of this schedule, except a publication that is subject to a different retention period in this schedule. For example, a meeting agenda (see RSIN 1.1.058) also meets the definition, but it must be retained permanently; RSIN 1.1.004, 1.1.055, 1.1.066, 1.1.068, and 4.5.003, which also meet the definition, are closely associated with the appropriations process and must be retained AC + 6	AC	2			AC = Until superseded or obsolete.		CAUTION: Many state publications must be submitted to the Texas State Publications Depository Program, Texas State Library and Archives Commission, by law (Government Code, 441.103-441.105). The Texas State Library and Archives Commission will retain a copy of all state publications submitted to it on a continuing basis, subject to periodic evaluation to determine if the publication merits further retention. For additional information and requirements concerning state publications made available to the public through the internet, consult the administrative rules of the Texas State Publications Depository Program of the Texas State Library and Archives Commission (13 TAC §§3.1-3.8).	



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TSD 18	1.1.007	Correspondence-Administrative	Incoming/outgoing and internal leadership, supervisory, managerial, executive, administrative, substantive, and other high-level correspondence in any media, including electronic communication, pertaining to the formulation, planning, implementation, interpretation, modification, or redefinition of the programs, services, or projects of an agency and the administrative regulations, policies, and procedures that govern them. Including Board member files.		4				R	<p>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.</p> <p>CAUTION: This records series and RSIN 1.1.008 should be used only for correspondence that is not included in or directly related to another records series on the agency's approved schedule. For example, a memorandum that documents an appropriations request must be retained for the minimum retention period prescribed by RSIN 1.1.004; a letter concerning an audit for that prescribed by RSIN 1.1.002, etc. See also RSIN 1.1.011.</p>	



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TSD 20	1.1.008	Correspondence-General	Non-administrative incoming/outgoing and internal correspondence, in any media, including electronic communication, pertaining to or arising from the routine operations of the policies, programs, services, or projects of an agency.		2						
TSD 21	1.1.006	Complaint and Feedback Records	Complaints and other unsolicited feedback received by an agency from the public concerning the agency and records pertaining to the resolution of complaints.	AC	2			AC = Date of receipt, action taken, or final disposition of the complaint, whichever comes last		CAUTION: If a complaint becomes the subject of litigation, it must be included in and is subject to the minimum retention period of RSIN 1.1.048.	
TSD 22	4.4	Budget Work Papers		FE	3						
TSD 24	5.3.004	Shipping Information	Shipping information, including order acknowledgements, packing slips, and related documentation.	AV						CAUTION: Some shipping information may require longer retention period. State agencies must determine if longer retention period is required based on the type of materials shipped to or from their agency.	
TSD 27	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 neither included in nor directly related to other records series in this schedule.	AC	3			AC = Decision made to implement or not to implement result of planning process.	R	ARCHIVES NOTE: Data processing planning records are not archival.	



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TSD 28	1.1.065	Reports and Studies (Non-Fiscal) – Raw Data	Information or data collected and compiled for the purpose of producing non-fiscal reports.	AV						Applies to IRB approved projects CAUTION: Does not include source documentation used for information or data included in or directly related to another records series in this schedule. See RSIN 1.1.064.	
TSD 29	1.1.038	Surveys and Questionnaires	Surveys soliciting feedback from customers, clients, or stakeholders of an agency, and the statistical data maintained rating an agency's performance.	AC				AC = Final disposition of summary report, or date of decision not to produce a report, as applicable.		Stakeholder surveys and CSS. See RSIN 1.1.067 for summary reports compiled from customer surveys.	
TSD 30	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					See RSIN 1.1.068 for reports on agency performance measures. 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.	
TXT 1		Textbook Custodian Bond Form		US	2					Form kept as required by TEC 31.102.	
TXT 2		Texas Education Agency Textbook Reports		FE	2						
TXT 3		Textbook Committee Adoption Report		FE	6						



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TXT 4	5.2.006	Yearly Textbook Inventory	Records documenting the inventorying, maintenance, usage, and disposal of supplies, equipment, and property of a state agency. Includes lost, stolen, and damage reports.	FE	3					See RSIN 5.2.008 for the maintenance logs of individual pieces of equipment. Refer to local schedule SD3475-04a for guidance to retention requirements. Any citations should be followed	
TXT 5		Textbook Activity Records	Records documenting the distribution, transfer, and return of textbooks on a campus by campus basis.	AC	2			AC = End of school year		TSD information: Librarians use Follett Resource Manager to keep track. Refer to local schedule SD3475-04c for guidance to retention requirements. Any citations should be followed.	
TXT 6	5.2.006	Instructional Materials Check-Out Cards	Records documenting the inventorying, maintenance, usage, and disposal of supplies, equipment, and property of a state agency. Includes lost, stolen, and damage reports.	FE	3					TSD information: Librarians use Follett Resource Manager to keep track See RSIN 5.2.008 for the maintenance logs of individual pieces of equipment.	



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TXT 7	5.2.008	Inspection, Repair, and Maintenance Records – Equipment	Equipment history file, which may include logbooks and requests for installation, moves, service, repair, etc.	LA	3					TSD information: Librarians use Follett Resource Manager to keep track For service agreements or contracts related to equipment repairs and service, retain in accordance with RSIN 5.1.001. For vehicle maintenance records, see RSIN 5.6.003.	
TXT 8	5.3.008	Science Materials Orders		FE	3						
WC 1	5.4.001	Workers Compensation Files	Accident or occupational disease reports (by supervisors and employees) and other associated reports required to be submitted to the State Office of Risk Management (SORM) or its predecessors or maintained internally on accident frequency.	CE	5					See RSIN 5.4.014a/b for non-employee accidents.	29 CFR 1904.33; 28 TAC 120.1(c).
WC 2	5.4.014 a	Accident Reports – Adults	Reports of accidents to adults on state property or in any other situation in which the state agency could be a party to a lawsuit.	AC	3			☒ AC = Date of report, or if a claim is filed, after settlement or denial of claim, whichever applicable.			
WC 3	5.4.014 b	Accident Reports – Minors	Reports of accidents to minors on state property or in any other situation in which the state agency could be a party to a lawsuit.	AC	3			AC = Date minor reaches the age of majority, or if a claim filed, after settlement or denial, whichever applicable.			