

Record Number	Record Title	Record Description	Retention Period	Remarks
*GR1050-12	EMPLOYEE SERVICE RECORDS	Summary employment history record for each employee maintained on one or more forms, containing the following minimum information: name; sex; date of birth; social security number; positions held with dates of hire, promotion, transfer, or demotion; dates of leaves of absence or suspension that affect computation of length of service; wage or salary rate for each position held, including step or merit increases within grades; most recent public access option form; and date of separation.	Date of separation + 75 years.	<p>For other information on employees that must also be retained either as part of this record or in another form, see item numbers GR1050-52(b) and GR1050-54(a).</p> <p>Retention Notes: a) This schedule does not require the creation of an employee service record of the type described, but the creation of the record is strongly recommended to allow frequent disposal of documents from which information has been summarized. If an employee service record is not maintained, documents (e.g., employment applications, personnel action forms) containing the prescribed information must be retained date of separation + 75 years. More than one document providing the same element of required information need not be retained.</p> <p>b) The Teacher Service Record (Texas Education Agency Form FIN-115 or its equivalent), containing information required by statute or regulation, shall be considered an employee service record of the type described and must be retained date of separation + 75 years.</p> <p>c) Salary or wage data on an employee service record may be indicated by grade and step numbers if all corresponding wage rate tables (see item number GR1050-59) applicable to a person's employment history are retained date of separation + 75 years.</p>

Record Number	Record Title	Record Description	Retention Period	Remarks
GR1050-13	EMPLOYMENT ADVERTISEMENTS OR ANNOUNCEMENTS	Advertisements or postings relating to job openings, promotions, training programs, or overtime opportunities, including jobs orders submitted to employment agencies.	2 years.	By regulation - 29 CFR 1602.31, 1602.40, and 1602.49.
GR1050-14	EMPLOYMENT APPLICATIONS	Applications, transcripts, letters of reference, and similar documents whose submission by candidates for vacant positions (both hired and not hired) or for promotion, transfer, or training opportunity (both selected and not selected) is required on the application form, by application procedures, or in the employment advertisement.	2 years from the creation (or receipt) of the record or the personnel action involved, whichever later.	By regulation - 29 CFR 1602.31, 1602.40, and 1602.49.
GR1050-14a	EMPLOYMENT APPLICATIONS	Samples of publications, artwork, or other products of prior achievement not returned to applicants.	AV.	
GR1050-14b	EMPLOYMENT APPLICATIONS	Transcripts of persons hired if state or federal law or regulation mandates a level of education needed to qualify for employment (e.g., school district professional and paraprofessional personnel). See also item number GR1050-28(a).	Date of separation + 5 years.	Retention Note: If applicant screening or hiring decisions are based on resumé's, with only successful or interviewed candidates completing employment applications, then resumé's of persons not hired must be kept for the same period as employment applications. If resumé's are supplemental to employment application forms, they need only be retained as long as administratively valuable.
GR1050-15	EMPLOYMENT CONTRACT/COLLECTIVE BARGAINING RECORDS			
GR1050-15a	EMPLOYMENT CONTRACT/COLLECTIVE BARGAINING RECORDS	Contracts and agreements, including collective bargaining agreements, between a local government and an employee or a group of employees, including written acceptances of such contracts.	Last effective date of contract + 4 years.	
GR1050-15b	EMPLOYMENT CONTRACT/COLLECTIVE BARGAINING RECORDS	Records relating to the negotiation of collective bargaining agreements or similar group contracts, including reports; correspondence; mediation or arbitration agreements; the proceedings, findings, and awards of arbitration boards; and similar records.	Last effective date of contract + 4 years or, if no agreement or contract results, 4 years.	

Record Number	Record Title	Record Description	Retention Period	Remarks
GR1050-16	EQUAL EMPLOYMENT OPPORTUNITY RECORDS AND REPORTS			
GR1050-16a	EQUAL EMPLOYMENT OPPORTUNITY RECORDS AND REPORTS	Reports, analyses, or statistical data compiled from source documentation used to complete EEO reports.	3 years.	By regulation - 29 CFR 1602.30, 1602.39, and 1602.48.
GR1050-16b	EQUAL EMPLOYMENT OPPORTUNITY RECORDS AND REPORTS	EEO-1, EEO-4, EEO-5, and EEO-6 reports.	3 years.	By regulation - 29 CFR 1602.32, 1602.41, and 1602.50.
GR1050-16c	EQUAL EMPLOYMENT OPPORTUNITY RECORDS AND REPORTS	Case files relating to discrimination complaints, including complaints, legal and investigative documents, exhibits, related correspondence, withdrawal notices, and decisions or judgments.	Resolution of case + 3 years.	
GR1050-17	EQUAL PAY RECORDS	Reports, studies, aggregated or summarized data, and similar documentation compiled to monitor and demonstrate compliance with the Equal Pay Act.	2 years.	By regulation - 29 CFR 1620.32(c).
GR1050-18	FIDELITY BONDS		Effective life of bond + 5 years.	Retention Note: Does not include the Official Bond Record maintained by county clerks, which must be retained PERMANENTLY.
GR1050-19	FINGERPRINT CARDS		Date of separation + 5 years.	Retention Note: If fingerprint cards are created for all applicants for a position, those of persons not hired must be retained 2 years under item number GR1050-14.
GR1050-20	GRIEVANCE RECORDS	Records relating to the review of employee grievances against personnel policies, working conditions, etc.	2 years.	Retention Note: Do not confuse these records with those involving EEO complaints [see item number GR1050-16(c)].
*GR1050-21	JOB EVALUATIONS (PERFORMANCE APPRAISALS)		US + 2 years; or date of separation + 2 years, whichever is applicable.	By regulation - 29 CFR 1620.32(c). Refer to SD575-05 pertaining to evaluations on school teachers.
GR1050-22	MEDICAL AND EXPOSURE REPORTS			

Record Number	Record Title	Record Description	Retention Period	Remarks
GR1050-22a	MEDICAL AND EXPOSURE REPORTS	Health, physical or psychological examination reports or certificates of all job applicants if physical or psychological condition is a factor in hiring decisions, including the promotion, transfer, or selection for training of current personnel.	2 years.	By regulation - 29 CFR 1602.31, 1602.40, and 1602.49.
*GR1050-22b	MEDICAL AND EXPOSURE REPORTS	Health or physical examination reports or certificates of employees for whom periodic monitoring of health or fitness is required. (1) For employees exposed in the course of their work to toxic substances, harmful physical agents, or bloodborne pathogens. (2) For all other employees.	Date of separation + 30 years.	By regulation - 29 CFR 1910.1020(d)(1)(i)-(iii).
*GR1050-22c	MEDICAL AND EXPOSURE REPORTS	Environmental, biological, and material safety monitoring reports concerning toxic substances and harmful physical agents in the workplace, including analyses derived from such reports.	US + 2 years. 30 years.	By regulation - 29 CFR 1910.1020(d)(1)(ii). See Local Schedule PW 5450-01 for Asbestos Management Records.
*GR1050-22d	MEDICAL AND EXPOSURE REPORTS	Records of controlled substances and alcohol use and testing. (1) Records of driver alcohol test results indicating an alcohol concentration of 0.02 or greater; records of driver verified positive controlled substances test results; documentation of refusals to take required alcohol and/or controlled substances tests; driver evaluation and referrals; calibration documentation; records related to the administration of the alcohol and controlled substances testing programs; copy of each annual calendar year summary required by 49 CFR 382.401. (2) Records related to the alcohol and controlled substances collection process. (3) Records of negative and canceled controlled substances test results and alcohol test results with a concentration of less than 0.02.	5 years. 1 year.	By regulation - 49 CFR 382.401

Record Number	Record Title	Record Description	Retention Period	Remarks
GR1050-23	OATHS OF OFFICE		US + 5 years or 5 years after leaving position for which oath required, whichever is applicable.	
GR1050-24	PERSONNEL ACTION OR INFORMATION NOTICES	Documents used by personnel officers to create or change information in the personnel records of individual employees concerning hiring, termination, transfer, pay grade, position or job title, leaves of absence, name changes, and similar personnel actions except those noted elsewhere in this part.	2 years.	By regulation - 29 CFR 1602.31, 1602.40, and 1602.49.
GR1050-25	PERSONNEL STUDIES AND SURVEYS	Studies, statistical reports, surveys, cost analyses and projections, and similar records, except those noted elsewhere in this part, on any aspect of the personnel management or administration of a local government.	3 years.	Retention Note: Review before disposal; some documents may merit PERMANENT retention for historical reasons.
GR1050-26	POSITION DESCRIPTION, CLASSIFICATION, AND STAFF MONITORING RECORDS			
*GR1050-26a	POSITION DESCRIPTION, CLASSIFICATION, AND STAFF MONITORING RECORDS	Job descriptions, including any associated task or skill statements. Also includes documentation concerning the development and analysis of job descriptions and classification systems, including survey, review and audit reports; classification standards and guidelines; selection criteria; determination of classification appeals; etc.	US or position abolished + 4 years.	By regulation - 40 TAC 815.106(f).
GR1050-26b	POSITION DESCRIPTION, CLASSIFICATION, AND STAFF MONITORING RECORDS	Position staffing and vacancy reports.	US.	
GR1050-26c	POSITION DESCRIPTION, CLASSIFICATION, AND STAFF MONITORING RECORDS	Personnel requisitions.	2 years.	

Record Number	Record Title	Record Description	Retention Period	Remarks
GR1050-27	REDUCTION IN FORCE PLANS (including any related implementation documentation)		US, or if implemented, 2 years from date of last reduction in force action under the plan.	
*GR1050-28	TRAINING AND EDUCATIONAL ACHIEVEMENT RECORDS			For other records relating to aptitude or skills tests required of job applicants or of current personnel to qualify for promotion or transfer see item number GR1050-02.
*GR1050-28a	TRAINING AND EDUCATIONAL ACHIEVEMENT RECORDS	Certificates of completion, transcripts, test scores, or similar records documenting the training, testing, or continuing education achievements of an employee if such training or testing is required for the position held or if the educational or skill attainment or enhancement affects or could affect career advancement in the local government or, in the case of licensed or certified personnel (e.g., school professionals, firefighters, police officers, health care professionals), in other governments or the private sector.	Date of separation + 5 years.	Retention Note: If information concerning training or testing (e.g., test scores) is transferred to an Employee Service Record (item number GR1050-12), the document from which the information is taken need be retained for only 2 years.
*GR1050-28b	TRAINING AND EDUCATIONAL ACHIEVEMENT RECORDS	Records documenting the planning, development, implementation, administration and evaluation of in-house training programs.	2 years.	
*GR1050-28c	TRAINING AND EDUCATIONAL ACHIEVEMENT RECORDS	Training manuals, syllabuses, course outlines, and similar training aids used in in-house training programs.	US, expired, or discontinued + 2 years.	
*GR1050-28d	TRAINING AND EDUCATIONAL ACHIEVEMENT RECORDS	Skill or achievement measurement records of a training group or class as a whole (e.g., rosters with scores).	2 years.	Retention Note: If the only information documenting the in-house training of an employee of the types described in (a) is contained in the measurement records of a group or class as a whole, the group records must be retained for the date of separation + 5 years for all employees included in the group records.
*GR1050-29	UNEMPLOYMENT COMPENSATION CLAIMS RECORDS	Unemployment claims, pertinent correspondence, and similar records documenting unemployment compensation cases.	After closed + 5 years.	

Record Number	Record Title	Record Description	Retention Period	Remarks
*GR1050-30	VERIFICATIONS OF EMPLOYMENT ELIGIBILITY (INS Form I-9)		3 years from hire or 1 year after separation, whichever later.	By regulation - 8 CFR 1274a.2 (b) (2) (i) (A) and (c) (2). Retention Note: If a former employee is rehired and an INS Form I-9 is still on file for the employee, the 3-year retention period dates from date of first hire.
GR1050-31	WORK SCHEDULES	Work, duty, shift, crew, case schedules, rosters, or assignments except work schedules includable in item number GR1050-56.	1 year.	
*GR1050-32	WORKERS COMPENSATION CLAIM RECORDS	Initial and supplemental reports of accidents to or job-related illnesses of employees and documentation relating to any subsequent filing of claims by employees.	CE of closure of claim + 5 years.	By regulation - 29 CFR 1904.33 for accident and illness reports. Retention Note: Refer to GR1050-22b (1) in this schedule. The local governments' insurer and the Texas Department of Insurance keep permanent records of workers compensation related records. Retention Note: For campaign contribution and expenditure statements see item number EI.3125-01 in Local Schedule EI. (Records of Elections and Voter Registration). Retention Note: The last public access option form completed by an employee prior to termination of employment must be retained as part of the Employee Service Record (see record number GR1050-12 in this schedule).
GR1050-33	FINANCIAL DISCLOSURE STATEMENTS	Financial disclosure statements of officers and/or employees of a local government.	2 years.	
*GR1050-34	PUBLIC ACCESS OPTION FORMS	Form completed and signed by employee or official, or former employee or official, electing to keep home address, home telephone number, social security number, and family information open or confidential under the Public Information Act, Government Code 552.04.	U.S.	
*GR1050-35	EMPLOYEE EXIT INTERVIEWS	Records of interviews and other supporting documentation conducted at time of employee termination.	Date of separation + 2 years.	

Record Number	Record Title	Record Description	Retention Period	Remarks
*GR1050-36	CRIMINAL HISTORY CHECKS	Used for condition of or in conjunction with employment application.	End of employee's probationary period or after immediate purpose has been fulfilled, as applicable.	By law - Government Code, Chapter 411 Subchapter F for certain education institutions and fire departments, and by authority of this schedule for all other local governments. Retention Note: A local government that is authorized to obtain criminal history recorded information from the Texas Department of Public Safety must refer to Subchapter F, Chapter 411, Government Code for appropriate retention and use of this information.
*GR1050-37	EMPLOYEE ACKNOWLEDGEMENT FORMS	Employee acknowledgement forms or other documentation that show proof of receipt and awareness of local government policies and procedures.	US or date of separation +2 years, as applicable.	
*GR1050-38	UNSOLICITED RESUMES	Unsolicited resumes received by local governments not used in the employment selection process.	AV.	Retention Note: See item number GR1050-14 for resumes, whether solicited or unsolicited, that are used in any way in the employment selection process.
*GR1050-39	VOLUNTEER SERVICE FILES	Information about individual volunteers and duties they perform.	US or date of separation + 3 years.	

SECTION 3-2: PAYROLL RECORDS

Retention Note: OTHER ACCOUNTING RECORDS - This section supplements Section 2-2 and schedules financial and accounting records found in most local governments specific to the disbursement of payroll. If a payroll-related record is not scheduled in this section, use Section 2-2 for the comparable record; e.g., payroll fund reconciliations should be retained for FE + 5 years under the retention for Banking Records (see item number GR1025-28).

Record Number	Record Title	Record Description	Retention Period	Remarks
GR1050-50	DEDUCTION AUTHORIZATIONS	Documentation used to start, modify, or stop all voluntary or required deductions from payroll, including orders of garnishment or other court-ordered attachments.	4 years after separation or 4 years after amendment, expiration, or termination of authorization, whichever sooner.	
*GR1050-51	DIRECT DEPOSIT APPLICATIONS/AUTHORIZATIONS		US or date of separation, as applicable.	
GR1050-52	EARNINGS AND DEDUCTION RECORDS			

Record Number	Record Title	Record Description	Retention Period	Remarks
*GR1050-52a	EARNINGS AND DEDUCTION RECORDS	A record containing the following payroll information on each employee: name, last known address and social security number, amount of wages paid to the employee for each payroll period, including all deductions, and date of payment.	Retention of any one of the following records for 5 years by school districts or 4 years by other local governments will satisfy the retention requirement: 1) Individual employee earnings card or record that shows earnings and deductions for each pay period. 2) Master payroll register which shows earnings and deductions for each pay period.	By regulation - 20 CFR 404.1225(b) (3) and 40 TAC 815.106(f).

Record Number	Record Title	Record Description	Retention Period	Remarks
*GR1050-52b	EARNINGS AND DEDUCTION RECORDS	A record containing the following minimum pension and deferred compensation information on each employee: name, date of birth, social security number, and amount of pension and deferred compensation deductions.	<p>The retention of any one of the following for date of separation + 75 years will satisfy the retention requirement:</p> <p>1) Individual employee earnings card or record as in (a) (1).</p> <p>2) Employee Service Record (see item number GR1050-12) if it contains the prescribed pension and deferred compensation deduction data.</p> <p>3) Master payroll register, or the final year-to-date register of each calendar year, if the register shows all persons employed during the year from whose wages, pension, and deferred compensation deductions were made.</p>	

Record Number	Record Title	Record Description	Retention Period	Remarks
GRI050-52b (continued)	EARNINGS AND DEDUCTION RECORDS		4) Pension and deferred compensation deduction register, or the final year-to-date pension deduction register of each calendar year, if the register lists all persons employed during the year from whose wages pension and deferred compensation deductions were made.	
			5) Copies of annual or other periodic statements furnished to each employee detailing the deductions and contributions to a pension or deferred compensation plan during the past year or period.	
*GRI050-52c	EARNINGS AND DEDUCTION RECORDS	Master payroll register, including year-to-date registers, if not used to satisfy either of the retention requirements set in (a) or (b).	FE + 5 years for school districts; FE + 3 years for other governments.	

Record Number	Record Title	Record Description	Retention Period	Remarks
*GR1050-52d	EARNINGS AND DEDUCTION RECORDS	Subsidiary payroll registers, if not used to satisfy either of the retention requirements set in (a) or (b). (1) If data contained in the subsidiary payroll register is not contained in the master payroll register. (2) If data contained in the subsidiary payroll register is contained in the master payroll register.	FE + 5 years for school districts; FE + 3 years for other governments. AV.	
GR1050-52e	EARNINGS AND DEDUCTION RECORDS	Copies of annual or other periodic statements furnished to each employee detailing the deductions and contributions to a pension or deferred compensation plan during the past year or period, if not used to satisfy the retention requirement set in (b).	2 years.	
*GR1050-52f	EARNINGS AND DEDUCTION RECORDS	Payroll adjustment records, including transaction registers, authorizations, and similar records authorizing and detailing adjustments to payroll records because of overpayment, underpayment, etc.	FE + 5 years for school districts; FE + 3 years for other governments.	
GR1050-53	FEDERAL AND STATE TAX FORMS AND REPORTS			
GR1050-53a	FEDERAL AND STATE TAX FORMS AND REPORTS	Forms used to determine withholding from wages and salaries for payroll tax purposes (W-4 Forms).	4 years after separation or 4 years after form amended, whichever sooner.	By regulation - 20 CFR 404.1225(b) (3), 26 CFR 31.6001-1(e) (2) for federal forms and by authority of this schedule for any state forms.
GR1050-53b	FEDERAL AND STATE TAX FORMS AND REPORTS	Forms and reports used to report the collection, distribution, deposit, and transmittal of payroll or unemployment taxes (W-2, 1099).	4 years after tax due date or date tax paid, whichever later.	By regulation - 20 CFR 404.1225(b) (3), 26 CFR 31.6001-1(e) (2) for federal forms and by authority of this schedule for state forms.
GR1050-54	LEAVE RECORDS			

Record Number	Record Title	Record Description	Retention Period	Remarks
*GR1050-54a	LEAVE RECORDS	A record containing a record of the unused accumulated sick leave of each employee if (1) all or a percentage of accumulated sick leave is used to calculate length of service and/or (2) accumulated sick leave is creditable to an employee if rehired.	The retention of any one of the following for date of separation + 75 years will satisfy the retention requirement:	
		1) Individual employee earnings card or record as described in item number GR1050-52a if it also contains accumulated sick leave data.		
		2) Employee Service Record (see item number GR1050-12) if it contains the accumulated sick leave data prescribed.		
		3) Copy of the final time summary or leave status report, as noted in (d), of each separated employee.		
*GR1050-54b	LEAVE RECORDS	Requests and authorizations for vacation, compensatory, sick, Family and Medical Leave Act (FMLA), and other types of authorized leave, and supporting documentation.	FLE + 5 years for school districts; FLE + 3 years for other governments.	By regulation – 29 CFR 825.500.
*GR1050-54c	LEAVE RECORDS	Leave or hours-to-date registers.	FLE + 5 years for school districts; FLE + 3 years for other governments.	

Record Number	Record Title	Record Description	Retention Period	Remarks
GR1050-54d	LEAVE RECORDS	Copies of periodic time summary or leave status reports furnished to each employee containing information on vacation, sick, compensatory, or other leave earned and used, including the final report of separated employees if they are not used to satisfy the retention requirement set in (a).	2 years.	
GR1050-55	PAYROLL ACTION OR INFORMATION NOTICES	Documents used by payroll officers to create or change information in the payroll records of individual employees except deduction authorizations (see item number GR1050-50) and federal tax forms [see item number GR1050-53(a)].		
*GR1050-55a	PAYROLL ACTION OR INFORMATION NOTICES	Documents concerning hiring, termination, transfer, pay grade, position or job title, name changes, etc.	2 years.	By regulation - 29 CFR 1602.31, 1602.40, and 1602.49. Retention Note: Refer to GR1050-12 in this schedule as some information must be kept in Employee Service Record.
*GR1050-55b	PAYROLL ACTION OR INFORMATION NOTICES	Documents concerning adjustments to payroll and leave status.	FE + 3 years.	Retention Note: Refer to GR1050-12 in this schedule as some information must be kept in Employee Service Record.
*GR1050-56	TIME AND ATTENDANCE REPORTS	Time cards or sheets, including work schedules and documentation evidencing adherence to or deviation from normal hours for those employees working on fixed schedules.	4 years.	By regulation - 40 TAC 815.106(i).
GR1050-57	TIME CHANGE RECORDS	Requests and authorizations for overtime, time trading, and other actions that affect normal work time except leave requests [see item number GR1050-54(c)].	2 years.	
*GR1050-58	REIMBURSABLE ACTIVITIES, REQUESTS AND AUTHORIZATIONS TO ENGAGE IN	Requests and authorizations for travel; participation in educational programs, workshops, or college classes; or for other <i>bona fide</i> work-related activities in which the expenses of an employee are defrayed or reimbursed.	FE + 5 years for school districts; FE + 3 years for other governments.	
GR1050-59	WAGE AND SALARY RATE TABLES			

Record Number	Record Title	Record Description	Retention Period	Remarks
GR1050-59a	WAGE AND SALARY RATE TABLES	If wage or salary rate for each position listed on an Employee Service Record (see item number GR1050-12) is expressed in dollars.	2 years after last effective date.	By regulation - 29 CFR 516.6(a) (2).
GR1050-59b	WAGE AND SALARY RATE TABLES	If wage or salary rate for each position listed on an Employee Service Record (see item number GR1050-12) is indicated by grade or step number only.	Date of separation + 75 years.	

PART 4: SUPPORT SERVICES RECORDS

SECTION 4-1: PURCHASING RECORDS

Retention Notes: RELATIONSHIP WITH ACCOUNTS PAYABLE RECORDS - In a local government in which purchasing and accounts payable records (see item number 1025-26) are maintained by the same individual or department, duplicate copies of a record need not be created and/or retained to satisfy the retention requirements of this section if the record is used in documenting both the ordering and procurement of and payment for goods and services. In such instances, retention requirements for accounts payable records prevail over those noted in this section.

Record Number	Record Title	Record Description	Retention Period	Remarks
GR1075-01	BIDS AND BID DOCUMENTATION			
*GR1075-01a	BIDS AND BID DOCUMENTATION	Successful bids and requests for proposals, including invitations to bid, bid bonds and affidavits, bid sheets, and similar supporting documentation.	FE of award + 5 years for school districts; FE + 3 years for other governments.	Retention Note: If a formal written contract is the result of a successful bid or request for proposal, the successful bid or request for proposal and its supporting documentation must be retained for the same period as the contract. See item number GR1000-25.
GR1075-01b	BIDS AND BID DOCUMENTATION	Unsuccessful bids.	2 years.	
*GR1075-01c	BIDS AND BID DOCUMENTATION	Requests for informal bid estimates, quotes, or responses from providers for the procurement of goods or services for which state law or local policy does not require the formal letting of bids.	1 year.	

Record Number	Record Title	Record Description	Retention Period	Remarks
*GR1075-01d	BIDS AND BID DOCUMENTATION	Requests for information (RFI) preliminary to the procurement of goods or services by direct purchase or bid.	AV after date of direct purchase, issuance of request for bids, or decision not to proceed with the procurement, as applicable.	
GR1075-02	INVENTORY RECORDS (PARTS AND SUPPLIES)		1 year.	
GR1075-03	PURCHASE ORDER AND RECEIPT RECORDS			
*GR1075-03a	PURCHASE ORDER AND RECEIPT RECORDS	Purchase orders, requisitions, and receiving reports.	FE + 5 years for school districts; FE + 3 years for other governments.	
GR1075-03b	PURCHASE ORDER AND RECEIPT RECORDS	Purchasing log, register, or similar record providing a chronological record of purchase orders issued, orders received, and similar data on procurement status.	FE + 3 years.	
GR1075-03c	PURCHASE ORDER AND RECEIPT RECORDS	Packing slips and order acknowledgments.	AV.	
GR1075-03d	PURCHASE ORDER AND RECEIPT RECORDS	Vendor and commodity lists.	US.	

SECTION 4-2: FACILITY, VEHICLE, AND EQUIPMENT MANAGEMENT RECORDS

Record Number	Record Title	Record Description	Retention Period	Remarks
GR1075-15	ACCIDENT AND DAMAGE REPORTS (PROPERTY)	Reports of accidents or damage to facilities, vehicles, or equipment if no personal injury is involved.	3 years.	Retention Note: For accident reports involving personal injury see item numbers GR1000-20 and GR1050-32.
*GR1075-16	CONSTRUCTION PROJECT RECORDS			

Record Number	Record Title	Record Description	Retention Period	Remarks
*GR1075-16a	CONSTRUCTION PROJECT RECORDS	Records concerning the planning, design, construction, conversion, or modernization of local government-owned facilities, structures, and systems, including feasibility, screening, and implementation studies; topographical and soil surveys and reports; architectural and engineering drawings, elevations, profiles, blueprints, and as-builts; inspection and investigative reports; laboratory test reports; environmental impact statements; construction contracts and bonds; correspondence; and similar documentation except as described in (b).	PERMANENT.	Retention Note: If a structure, facility, or system is sold or transferred to another person or entity, the local government must retain the original records relating to its construction. Copies of the records may be given to the person or entity to whom the structure, facility, or system is sold or transferred.
*GR1075-16b	CONSTRUCTION PROJECT RECORDS	Records of the types described in (a) relating to the construction of prefabricated storage sheds, bus shelters, parking lot kiosks, non-structural recreational facilities such as baseball diamonds and tennis courts, and similar structures and facilities.	Completion of the project + 10 years.	Retention Note: Review before disposal; some records may merit PERMANENT retention for historical reasons. Records relating to construction of some of the described structures will have historical value if they are closely associated with a major structure as described in (a). For example, records relating to the construction of gazebos, fountains, walls, or statuary located on the grounds of a county courthouse are part of the landscape of the courthouse and its grounds and should be retained PERMANENTLY . Records of the types described relating to government-owned structures or places eligible for or already listed as historic by national, state, or local organizations or authorities must be retained PERMANENTLY .

Record Number	Record Title	Record Description	Retention Period	Remarks
GR1075-16c	CONSTRUCTION PROJECT RECORDS	Records relating to construction projects described in (a) and (b), that are transitory or of ephemeral relevance, and are not required for maintaining, modifying, and repurposing the building or structure. Records may include, but are not limited to, rejected design plans, delivery tickets for expendable products, daily work reports, etc.	5 years	Retention Note: Records of the types described relating to government-owned structures or places eligible for or already listed as historic by national, state, or local organizations or authorities must be retained PERMANENTLY .
GR1075-17	LOST AND STOLEN PROPERTY REPORTS		FE + 3 years.	
GR1075-18	MAINTENANCE, REPAIR, AND INSPECTION RECORDS	Records documenting the maintenance, repair, and inspection of facilities, vehicles, and equipment.		Retention Note: This record group schedules records of maintenance and repair to general-purpose vehicles, office equipment, and office facilities. For retention requirements for the maintenance and repair of specialized vehicles (e.g., police cars, fire trucks, school buses), equipment (e.g., airport runway beacons, traffic lights), or facilities (e.g., wastewater treatment plants) see other commission schedules.
*GR1075-18a	MAINTENANCE, REPAIR, AND INSPECTION RECORDS	Vehicles and equipment. (1) Routine inspection records. (2) Maintenance and repair records.	1 year. Life of asset.	Retention Note: If a vehicle is salvaged as the result of an accident, the maintenance and repair records for the vehicle must be retained for date of salvage + 1 year.

Record Number	Record Title	Record Description	Retention Period	Remarks
*GR1075-18b	MAINTENANCE, REPAIR, AND INSPECTION RECORDS	Facilities. (1) Routine cleaning, janitorial, and inspection work. (2) All other facility maintenance, repair and inspection records (including those relating to plumbing, electrical, fire suppression, and other infrastructural systems).	1 year. 5 years.	Retention Note: Records of the types described relating to government-owned structures or places eligible for or already listed as historic by national, state, or local organizations or authorities must be retained PERMANENTLY .
GR1075-19	SERVICE REQUESTS/WORK ORDERS (for repairs and maintenance to facilities, vehicles, or equipment)		2 years.	Retention Note: If work orders serve as the only form of record documenting repairs to vehicles or equipment [see item number GR1075-18(a)] they must be retained for the life of the vehicle or equipment.
GR1075-20	USAGE REPORTS	Reports of usage of facilities, vehicles, and equipment.		
*GR1075-20a	USAGE REPORTS Reports of usage of facilities, vehicles, and equipment	Any type of usage report (e.g., mileage, fuel consumption, copies run) if such reports are the basis for allocating costs, for determining payment under rental or lease agreements, etc.	FE + 5 years for school districts; FE + 3 years for other governments.	
GR1075-20b	USAGE REPORTS Reports of usage of facilities, vehicles, and equipment	Reservation logs or similar records relating to the use of facilities such as meeting rooms, auditoriums, etc. by the public or other governmental agencies.	2 years.	
GR1075-20c	USAGE REPORTS Reports of usage of facilities, vehicles, and equipment	Usage reports compiled for purposes other than those noted in (a) or (b).	1 year.	
*GR1075-21	VEHICLE OR EQUIPMENT ASSIGNMENT RECORDS	Assignment logs, authorizations, and similar records relating to the assignment and use of government-owned vehicles or equipment by employees.	After return or reassignment + 2 years.	
GR1075-22	VISITOR CONTROL REGISTERS	Logs, registers, or similar records documenting visitors to limited access or restricted areas.	3 years.	Retention Note: If the visitor control register is needed as part of an investigation it should be retained with the investigation case file PSA125-05.
GR1075-23	WARRANTIES (for vehicles and equipment)		Expiration of warranty + 1 year.	

Record Number	Record Title	Record Description	Retention Period	Remarks
*GR1075-24	VEHICLE TITLES AND REGISTRATIONS	Vehicle titles and registrations of government-owned vehicles.	I.A.	
*GR1075-25	SURVEILLANCE VIDEOS	Video surveillance for, but not limited to, security of property and persons.	AV.	Retention Note: If the surveillance video is needed as part of an investigation it should be retained with the investigation case file PS4125-05.

SECTION 4-3: COMMUNICATIONS RECORDS

Record Number	Record Title	Record Description	Retention Period	Remarks
GR1075-40	POSTAL AND DELIVERY SERVICE RECORDS			
GR1075-40a	POSTAL AND DELIVERY SERVICE RECORDS	Meter and permit usage records.	1 year.	
GR1075-40b	POSTAL AND DELIVERY SERVICE RECORDS	Registered, certified, insured, and special delivery mail receipts and similar records of transmittal by express or delivery companies.	1 year.	
GR1075-41	TELEPHONE LOGS OR ACTIVITY REPORTS	Registers or logs of telephone calls and fax transmissions made and similar activity reports.		
*GR1075-41a	TELEPHONE LOGS OR ACTIVITY REPORTS	If the log, report, or similar record is used for cost allocation purposes.	FE + 5 years for school districts; FE + 3 years for other governments.	
*GR1075-41b	TELEPHONE LOGS OR ACTIVITY REPORTS	If the log, report, or similar record is used for internal control purposes other than cost allocation.	1 year.	
*GR1075-41c	TELEPHONE LOGS OR ACTIVITY REPORTS	Internal telephone directory of local government employees. Directory may include personal contact information (e.g. personal telephone number, home address, etc.).	US, expired, or discontinued.	

Record Number	Record Title	Record Description	Retention Period	Remarks
*GR5825-10	NETWORK CIRCUITS INVENTORIES	Records containing information on network circuits used by the government including circuit number, vendor, type of connection, terminal series, software, contact person, and other relevant information about the circuit.	US.	
*GR5825-11	NETWORK IMPLEMENTATION RECORDS	Records used to implement a computer network including reports, diagrams of network, and wiring schematics.	US.	
GR5825-12	OPERATING SYSTEM AND HARDWARE CONVERSION PLANS	Records relating to the replacement of equipment or computer operating systems not included elsewhere in this schedule.	1 year after completion of conversion.	
GR5825-13	OUTPUT RECORDS FOR COMPUTER PRODUCTION	Reports showing transactions that were accepted, rejected, suspended, and/or processed.	AV.	
GR5825-14	QUALITY ASSURANCE RECORDS	Information verifying the quality of system, hardware, or software operations including records of errors or failures and the loss of data resulting from such failures, documentation of abnormal termination and of error free processing, checks of changes put into production, transaction histories, and other records needed as an audit trail to evaluate data accuracy.	Until no longer needed as an audit trail for records modified.	
*GR5825-15	PROJECT RECORDS	Records created and used in the development, redesign, or modification of automated systems or applications.		Retention Note: Does not include purchasing records for computer software or hardware such as individual personal computers, which are covered in Part 4 of this schedule.
GR5825-15a	PROJECT RECORDS	Project management records, design documentation, feasibility studies, justifications, user requirements, etc.	3 years after completion of project.	
GR5825-15b	PROJECT RECORDS	Routine status reports, memos, and correspondence.	AV.	
GR5825-16	SYSTEM ACTIVITY MONITORING RECORDS	Electronic files or automated logs created to monitor computer systems such as print spool logs, console logs, tape activity logs, etc.	AV.	

Record Number	Record Title	Record Description	Retention Period	Remarks
*GR5825-17	ELECTRONIC RECORDS TRAINING RECORDS	Memoranda, flyers, catalogues, registration forms, rosters, and other records documenting training courses provided users of electronic records systems. (1) If the training is required to hold or to continue to hold a specific position or if the training is required of all employees. (2) If the training is not required to hold or continue to hold a specific position of if the training is not required of all employees.	Date of separation + 5 years. AV.	
*GR5825-18	INTERNET COOKIES	Data resident on hard drives that make use of user-specific information transmitted by the Web server onto the user's computer so that the information might be available for later access by itself or other servers.	AV.	Retention Note: The disposal of Internet cookies need not be documented through destruction authorizations (GR1000-40(b)), but governments should establish procedures governing disposal of these records as part of its records management plan (GR1000-40(d)).
*GR5825-19	HISTORY FILES – WEB SITES	A record of the documents visited during an Internet session that allows users to access previously visited pages more quickly or to generate a record of a user's progress.	AV.	Retention Note: The disposal of Internet history files need not be documented through destruction authorizations (GR1000-40(b)), but governments should establish procedures governing disposal of these records as part of its records management plan (GR1000-40(d)).
*GR5825-20	SOFTWARE REGISTRATIONS, WARRANTIES, AND LICENSE AGREEMENTS		LA + 3 years.	

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