

## GR – “Government” Records

Record Series	Record Title
GR1000	<b>PART 1: ADMINISTRATIVE RECORDS</b>
GR1025	<b>PART 2: FINANCIAL RECORDS</b>
GR1050	<b>PART 3: PERSONNEL AND PAYROLL RECORDS</b>
GR1075	<b>PART 4: SUPPORT SERVICES RECORDS</b>
GR5750	<b>Section 4-4: Workplace Safety Records</b>
GR5800	<b>PART 5: INFORMATION TECHNOLOGY RECORDS</b>
GR5825	<b>Section 5-2: Computer Operation and Technical Support Records</b>

### **PART 1: ADMINISTRATIVE RECORDS**

**Retention Note:** SCOPE OF SECTION - The retention periods established in this section also apply to the records of subsidiary boards, bureaus, commissions, or committees established by the governing body of a local government that have rulemaking or quasi-judicial authority over any activity or program of the government or that were established by ordinance, order, or resolution for the purposes of advising the governing body or a subsidiary body on policy. Consequently, the use of the term “governing body” in a records description includes the corresponding records of those subsidiary bodies.

### Section 1-1: Records of Governing Bodies

GR1000-01a	<b>Agendas</b>		GR1000-01b	<b>Agendas</b>
GR1000-02	<b>Dedications</b>		GR1000-03	<b>Minutes</b>
GR1000-03a	<b>Minutes</b>		GR1000-03b	<b>Minutes</b>
GR1000-03c	<b>Minutes</b>		GR1000-03d	<b>Minutes</b>
GR1000-03e	<b>Minutes</b>		GR1000-03f	<b>Minutes</b>
R1000-03g	<b>Minutes</b>		GR1000-04	<b>Open Meeting Notices</b>
GR1000-05	<b>Official Orders, Resolutions, or Proclamations</b>		GR1000-06	<b>Petitions</b>
GR1000-07	<b>Proclamations</b>		GR1000-08	<b>Speeches, Papers, and Presentations</b>

### Section 1-2: General Records

GR1000-20	<b>Accident Reports</b>		GR1000-20a	<b>Accident Reports</b>
GR1000-20b	<b>Accident Reports</b>		GR1000-21a	<b>Affidavits of Publication</b>
GR1000-21b	<b>Affidavits of Publication</b>		GR1000-21c	<b>Affidavits of Publication</b>
GR1000-22	<b>Annexation, Dis-annexation, Abolition, and Other Jurisdictional Records</b>		GR1000-23	<b>Charters</b>
GR1000-24	<b>Complaints</b>		GR1000-25	<b>Contracts, Leases, and Agreements</b>
GR1000-26	<b>Correspondence, Internal Memoranda, and Subject Files</b>		GR1000-26a	<b>Correspondence, Internal Memoranda, and Subject Files</b>
GR1000-26b	<b>Correspondence, Internal Memoranda, and Subject Files</b>		GR1000-26c	<b>Correspondence, Internal Memoranda, and Subject Files</b>
GR1000-27	<b>Deeds</b>		GR1000-28	<b>Easements</b>

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GR1000-29	<b>Insurance Policies</b>		GR1000-30	<b>Legal Opinions</b>
GR1000-31	<b>Litigation Case Files</b>		GR1000-32	<b>Minutes (STAFF)</b>
GR1000-33	<b>Public Relations Records</b>		GR1000-34	<b>Public Information Act Requests</b>
GR1000-34a	<b>Public Information Act Requests</b>		GR1000-34b	<b>Public Information Act Requests</b>
GR1000-35	<b>Organizational Charts</b>		GR1000-36	<b>Permits and Licenses</b>
GR1000-37	<b>Photographs, Recordings, and other Non-Textual Media</b>		GR1000-38	<b>Policy and Procedure Documentation</b>
GR1000-39	<b>Publications</b>		GR1000-40a	<b>Records Management Records</b>
GR1000-40b	<b>Records Management Records</b>		GR1000-40c	<b>Records Management Records</b>
GR1000-40d	<b>Records Management Records</b>		GR1000-41a	<b>Reports and Studies (Non- Fiscal)</b>
GR1000-41b	<b>Reports and Studies (Non-Fiscal)</b>		GR1000-42	<b>Waivers of Liability</b>
GR1000-43	<b>Conflicts Disclosure Statements and Conflict of Interest Questionnaires</b>		GR1000-44	<b>Local Government Officer,  Lists of:</b>
GR1000-45	<b>Calendars, Appointment and Itinerary Records</b>		GR1000-46	<b>Insurance Claims</b>
GR1000-47	<b>Customer Surveys</b>		GR1000-50	<b>Transitory Information</b>

## PART 2: FINANCIAL RECORDS

**Retention Notes:** AUDIT REQUIREMENTS - Most local governments are required by state law to conduct annual or biennial audits of their records and accounts. These audit requirements were taken into account in setting the retention periods in this schedule. The following retention rules also apply:

- 1) In any local government for which there is no statutory audit requirement and audits are conducted irregularly or in a local government in which a statutorily required audit is delayed, any record in this schedule whose retention period dates from the end of a fiscal year (FE) must be retained for the retention period stated or one year after audit, whichever later.
- 2) With regard to any special fund of a local government or elective county office for which there is no statutory audit requirement and the fund is not audited, any records listed under item numbers GR1025-26, GR1025-27, GR1025-28, and GR1025-30 associated with receipts and disbursements from or to the fund must be retained for FE + 10 years.

**Section 2-1: Fiscal Administration and Reporting Records**

GR1025-01a	<b>Fiscal Audit Records (by both internal and external auditors)</b>		GR1025-01b	<b>Fiscal Audit Records (by both internal and external auditors)</b>
GR1025-01c	<b>Fiscal Audit Records (by both internal and external auditors)</b>		GR1025-01d	<b>Fiscal Audit Records (by both internal and external auditors)</b>
GR1025-01e	<b>Fiscal Audit Records (by both internal and external auditors)</b>		GR1025-02	<b>Bank Security Records</b>
GR1025-03	<b>Bond Records</b>		GR1025-03a	<b>Bond Records</b>
GR1025-03b	<b>Bond Records</b>		GR1025-03c	<b>Bond Records</b>
GR1025-03d	<b>Bond Records</b>		GR1025-04a	<b>Budgets and Budget Documentation</b>
GR1025-04b	<b>Budgets and Budget Documentation</b>		GR1025-04c	<b>Budgets and Budget Documentation</b>
GR1025-04d	<b>Budgets and Budget Documentation</b>		GR1025-04e	<b>Budgets and Budget Documentation</b>
GR1025-05	<b>Capital Assets Records</b>		GR1025-05a	<b>Capital Assets Records</b>
GR1025-05b	<b>Capital Assets Records</b>		GR1025-05c	<b>Capital Assets Records</b>
GR1025-05d	<b>Capital Assets Records</b>		GR1025-06	<b>Federal Revenue Sharing Records</b>
GR1025-07	<b>Financial Reports</b>		GR1025-07a	<b>Financial Reports</b>
GR1025-07b	<b>Financial Reports</b>		GR1025-07c	<b>Financial Reports</b>
GR1025-07d	<b>Financial Reports</b>		GR1025-08	<b>Grant Development and Administrative Records</b>
GR1025-08a	<b>Grant Development and Administrative Records</b>		GR1025-08b	<b>Grant Development and Administrative Records</b>
GR1025-08c	<b>Grant Development and Administrative Records</b>		GR1025-08d	<b>Grant Development and Administrative Records</b>
GR1025-09a	<b>Investment Transaction Records</b>		GR1025-09b	<b>Investment Transaction Records</b>

GR1025-10	Charge Schedules and Price Lists		
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## **Section 2-2: Accounting Records**

**Retention Notes:** a) ACCOUNTING RECORDS OF MOTOR VEHICLE AND BOAT LICENSING AND REGISTRATION - For accounting and banking records relating to motor vehicle licensing not noted in this part, use Part 3 of Local Schedule TX.

GR1025-25	Accounting Policies and Procedures Documentation		GR1025-26a	Accounts Payable and Disbursement Records
GR1025-26b	Accounts Payable and Disbursement Records		GR1025-26c	Accounts Payable and Disbursement Records
GR1025-26d	Accounts Payable and Disbursement Records		GR1025-27	Accounts Receivable Records
GR1025-27a	Accounts Receivable Records		GR1025-27b	Accounts Receivable Records
GR1025-27c	Accounts Receivable Records		GR1025-27d	Accounts Receivable Records
GR1025-27e	Accounts Receivable Records		GR1025-29	Cost Allocation and Distribution Records
GR1025-28	Banking Records			
GR1025-30	Ledgers, Journals, and Entry Documentation		GR1025-30a	Ledgers, Journals, and Entry Documentation
GR1025-30b	Ledgers, Journals, and Entry Documentation		GR1025-30c	Ledgers, Journals, and Entry Documentation
GR1025-30d	Ledgers, Journals, and Entry Documentation		GR1025-31	Transaction Summaries
GR1025-31b	Transaction Summaries		GR1025-31c	Transaction Summaries
GR1025-31d	Transaction Summaries		GR1025-32	Unclaimed Property Documentation

### PART 3: PERSONNEL AND PAYROLL RECORDS

**Retention Notes:** a) FEDERAL RETENTION REQUIREMENTS - Federal retention periods for personnel and payroll records arise principally from the administration of the Civil Rights Act of 1964, Title VII; the Age Discrimination and Employment Act of 1967; the Equal Pay Act; the Fair Labor Standards Act; the Federal Insurance Contribution Act; and the Federal Unemployment Tax Act. Various federal agencies or departments of agencies administer these acts and, because retention periods are set to enable each agency to carry out its particular oversight authority, different retention periods are often established for the same record. In compiling Schedule GR, the longest applicable federal retention period is cited as authority for the retention period indicated. A federal regulation is not cited if a state law or regulation requires a longer retention period. A federal retention period is also not cited if a Texas statute of limitations makes a longer retention period advisable. For example, the federal retention requirement for employment contracts [see item number GR1050-15(a)] is given as 3 years from the last effective date of the contract in 26 CFR 516.5, but suits in Texas may be brought by either party to such a contract within four years of the occurrence of an alleged breach; therefore a retention period of 4 years from the last effective date of the contract is set in this schedule. All retention periods in this part apply, by authority of this schedule, to all local governments, although some of them may be otherwise exempt from the federal requirement cited. This provision does not require the creation by exempted local governments of any special documentation demonstrating compliance with federal regulations that may be required of non-exempted governments.

b) PERSONNEL FILES - The individual employee personnel file is not scheduled as a unit in this section; documents normally placed in such files are scheduled separately.

c) TERMINATED EMPLOYEES - Notwithstanding any retention periods in this part, all personnel records existing on the date of termination of an involuntarily terminated employee must be retained for 2 years from the date of termination [29 CFR 1602.31, 1602.40, and 1602.49].

d) JTPA AND CETA EMPLOYEES - Any records maintained on applicants for or holders of positions paid in whole or in part from Comprehensive Employees' Training Act (CETA) funds or affirmative action apprenticeship program funds administered by the U. S. Department of Labor must be retained for 5 years from the date of enrollment in the program. [29 CFR 30.8(e)]. This 5-year retention period is extended by authority of this schedule to comparable records on applicants for or holders of positions paid in whole or in part from Job Training Partnership Act (JTPA) funds.



e) DEFINITION OF EMPLOYEE - For the purposes of this part, the term “employee” also includes elected or appointed officials of a local government who are paid wages or a salary from any funds of the local government and anyone voluntarily working or not receiving payment or compensation for working.

### **Section 3-1: Personnel Records**

GR1050-01a	<b>Affirmative Action Plans</b>		GR1050-01b	<b>Affirmative Action Plans</b>
GR1050-02	<b>Aptitude and Skills Test Records</b>		GR1050-02a	<b>Aptitude and Skills Test Records</b>
GR1050-02b	<b>Aptitude and Skills Test Records</b>		GR1050-02c	<b>Aptitude and Skills Test Records</b>
GR1050-02d	<b>Aptitude and Skills Test Records</b>		GR1050-03	<b>Awards and Commendations</b>
GR1050-04	<b>Certificates and Licenses</b>		GR1050-05	<b>Conflict of Interest Affidavits</b>
GR1050-06a	<b>Counseling Program Records</b>		GR1050-06b	<b>Counseling Program Records</b>
GR1050-07	<b>Disciplinary and Adverse Action Records</b>		GR1050-08	<b>Employee Pension and Benefits Records</b>
GR1050-08a	<b>Employee Pension and Benefits Records</b>		GR1050-08b	<b>Employee Pension and Benefits Records</b>
GR1050-08c	<b>Employee Pension and Benefits Records</b>		GR1050-09	<b>Employee Recognition Records</b>
GR1050-10a	<b>Employee Security Records</b>		GR1050-10b	<b>Employee Security Records</b>
GR1050-11	<b>Employee Selection Records</b>		GR1050-12	<b>Employee Service Record</b>
GR1050-13	<b>Employment Advertisements or Announcements</b>		GR1050-14	<b>Employment Applications</b>
GR1050-14a	<b>Employment Applications</b>		GR1050-14b	<b>Employment Applications</b>
GR1050-15a	<b>Employment Contract/Collective Bargaining Records</b>		GR1050-15b	<b>Employment Contract/Collective Bargaining Records</b>
GR1050-16a	<b>Equal Employment Opportunity Records and Reports</b>		GR1050-16b	<b>Equal Employment Opportunity Records and Reports</b>



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GR1050-16c	<b>Equal Employment Opportunity Records and Reports</b>		GR1050-17	<b>Equal Pay Records</b>
GR1050-18	<b>Fidelity Bonds</b>		GR1050-19	<b>Fingerprint Cards</b>
GR1050-20	<b>Grievance Records</b>		GR1050-21	<b>Job Evaluations (Performance Appraisals)</b>
GR1050-22a	<b>Medical and Exposure Reports</b>		GR1050-22b	<b>Medical and Exposure Reports - Periodic</b>
GR1050-22c	<b>Medical and Exposure Reports</b>		GR1050-22d	<b>Medical and Exposure Reports - Periodic</b>
GR1050-23	<b>Oaths of Office</b>		GR1050-24	<b>Personnel Action or Information Notices</b>
GR1050-25	<b>Personnel Studies and Surveys</b>		GR1050-26a	<b>Position Description, Classification, and Staff Monitoring Records</b>
GR1050-26b	<b>Position Description, Classification, and Staff Monitoring Records</b>		GR1050-26c	<b>Position Description, Classification, and Staff Monitoring Records</b>
GR1050-27	<b>Reduction in Force Plans (including any related implementation documentation)</b>		GR1050-28	<b>Training and Educational Achievement Records</b>
GR1050-28a	<b>Training and Educational Achievement Records</b>		GR1050-28b	<b>Training and Educational Achievement Records</b>
GR1050-28c	<b>Training and Educational Achievement Records</b>		GR1050-28d	<b>Training and Educational Achievement Records</b>
GR1050-29	<b>Unemployment Compensation Claims Records</b>		GR1050-30	<b>Verification of Employment Eligibility (INS Form I-9)</b>
GR1050-31	<b>Work Schedules</b>		GR1050-32	<b>Workers Compensation Claim Records</b>
GR1050-33	<b>Financial Disclosure Statements</b>		GR1050-34	<b>Public Access Option Forms</b>
GR1050-35	<b>Employee Exit Interviews</b>		GR1050-36	<b>Criminal History Checks</b>

GR1050-37	<b>Employee Acknowledgement Forms</b>		GR1050-38	<b>Unsolicited Resumes</b>
GR1050-39	<b>Volunteer Service Files</b>			

### **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).

GR1050-50	<b>Deduction Authorizations</b>		GR1050-51	<b>Direct Deposit Applications/ Authorizations</b>
GR1050-52a	<b>Earnings and Deduction Records</b>		GR1050-52b	<b>Earnings and Deduction Records</b>
GR1050-52c	<b>Earnings and Deduction Records</b>		GR1050-52d	<b>Earnings and Deduction Records</b>
GR1050-52e	<b>Earnings and Deduction Records</b>		GR1050-52f	<b>Earnings and Deduction Records</b>
GR1050-53a	<b>Federal and State Tax Forms and Reports</b>		GR1050-53b	<b>Federal and State Tax Forms and Reports</b>
GR1050-54a	<b>Leave Records</b>		GR1050-54b	<b>Leave Records</b>
GR1050-54c	<b>Leave Records</b>		GR1050-54d	<b>Leave Records</b>
GR1050-55	<b>Payroll Action or Information Notices</b>		GR1050-55a	<b>Payroll Action or Information Notices</b>
GR1050-55b	<b>Payroll Action or Information Notices</b>		GR1050-56	<b>Time and Attendance Reports</b>
GR1050-57	<b>Time Change Records</b>		GR1050-58	<b>Requests and Authorizations to Engage in Reimbursable Activities</b>
GR1050-59a	<b>Wage and Salary Tables</b>		GR1050-59b	<b>Wage and Salary Tables</b>

## **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.

GR1075-01a	<b>Bids and Bid Documentation</b>		GR1075-01b	<b>Bids and Bid Documentation</b>
GR1075-01c	<b>Bids and Bid Documentation</b>		GR1075-01d	<b>Bids and Bid Documentation</b>
GR1075-02	<b>Inventory Records (Parts and Supplies)</b>		GR1075-03a	<b>Purchase Order and Receipt Records</b>
GR1075-03b	<b>Purchase Order and Receipt Records</b>		GR1075-03c	<b>Purchase Order and Receipt Records</b>
GR1075-03d	<b>Purchase Order and Receipt Records</b>			

### **Section 4-2: Facility, Vehicle, and Equipment Management Records**

GR1075-15	<b>Accident and Damage Reports (Property)</b>		GR1075-16a	<b>Construction Project Records</b>
GR1075-16b	<b>Construction Project Records</b>		GR1075-16c	<b>Construction Project Records</b>
GR1075-18	<b>Maintenance, Repair, and Inspection Records</b>		GR1075-18a	<b>Maintenance, Repair, and Inspection Records</b>
GR1075-18b	<b>Maintenance, Repair, and Inspection Records</b>		GR1075-19	<b>Service Requests/Work Orders (for repairs and maintenance to facilities, vehicles, or equipment)</b>
GR1075-20	<b>Usage Reports</b>		GR1075-20a	<b>Usage Reports - Reports of usage of facilities, vehicles, and equipment</b>
GR1075-20b	<b>Usage Reports - Reports of usage of facilities, vehicles, and equipment</b>		GR1075-20c	<b>Usage Reports - Reports of usage of facilities, vehicles, and equipment</b>
GR1075-21	<b>Vehicle or Equipment Assignment Records</b>		GR1075-22	<b>Visitor Control Registers</b>
GR1075-23	<b>Warranties (for vehicles and equipment)</b>		GR1075-24	<b>Vehicle Titles and Registration</b>
GR1075-25	<b>Surveillance Videos</b>			

### **Section 4-3: Communications Records**

GR1075-40a	<b>Postal and Delivery Service Records</b>		GR1075-40b	<b>Postal and Delivery Service Records</b>
GR1075-41	<b>Telephone Logs or Activity Reports</b>		GR1075-41a	<b>Telephone Logs or Activity Reports</b>
GR1075-41b	<b>Telephone Logs or Activity Reports</b>		GR1075-41c	<b>Telephone Logs or Activity Reports</b>
GR1075-42	<b>E-Rate Records</b>			

**Section 4-4: Workplace Safety Records**

GR5750-01	<b>Blood borne Pathogen Training Records</b>		GR5750-02	<b>Facility Chemical Lists</b>
GR5750-04	<b>Hazardous Materials Training Records</b>		GR5750-05	<b>Material Safety Data Sheets (MSDS)</b>
GR5750-06	<b>Workplace Chemical Lists</b>			