

GR – “Government” Records

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

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

Section 1-2: General Records

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

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

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

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

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

GR1050-37	Employee Acknowledgement Forms		GR1050-38	Unsolicited Resumes
GR1050-39	Volunteer Service Files			

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

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

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

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

Section 4-3: Communications Records

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

Section 4-4: Workplace Safety Records

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