

Equipment and Fleet Management Records Retention Schedule

Record Series Title	Records & Comments	State Retention Code Legal Retention
Accident and Damage Reports (Property) – Departmental copies	Reports of accidents or damage to facilities, vehicles, or equipment if no personal injury is involved. Note: For accidents that result in injury to persons, use GR 1000-20 A or B.	GR 1075-15 3 years
Accident Reports – Injury to Adult	Reports of accidents to adult persons on local government property or in any other situation in which a local government could be party to a law suit. If a claim is filed, use GR 1025-26. Incident is reported to Origami which is owned by ORM.	GR 1000-20A 3 years from date of report if no claim is filed; 3 years after settlement or denial of the claim if a claim is filed, whichever applicable.
Accident Reports – Injury to Minor	Reports of accidents to minor persons on local government property or in any other situation in which a local government could be party to a law suit. If a claim is filed, use GR 1025-26. Incident is reported to Origami which is owned by ORM.	GR 1000-20B Date minor reaches majority age + 3 years, if no claim filed; 3 years after settlement or denial of claim if a claim is filed, whichever applicable
Accounts Payable and Disbursement Records – Departmental copies	Claims, invoices, statements, copies of checks and purchase orders, expenditure authorizations, and similar records that serve to document disbursements, including those documenting claims for and reimbursements to employees for travel or other employment- related expenses. Includes employee expense reports, P-Card documentation, and petty cash records. Requests and authorizations for travel; participation in educational programs, workshops or college classes	GR 1025-26a FE + 3 years
Accounts Receivable Records - Accounts deemed un-collectable – Departmental copies	Records of accounts deemed un-collectable, including write-off authorizations.	GR 1025-27E FE of write off + 3 years
Accounts Receivable Records – Departmental copies	Records documenting the receipt of any monies by a local government that are remittable to the State Comptroller of Public Accounts. Including cash receipts, cash reports, and deposits.	GR 1025-27B FE + 5 years

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Revised: 11/13/20

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Audit Records – Departmental copies and work papers	Annual or biennial or other periodic audits of a department, program, fund. Working papers, summaries, and similar records created for the purposes of conducting an audit. Both Internal and External Audits. Includes Internal Control Reports. Note: Official record copy of Audit Reports filed in City Secretary's Office (permanent retention)	GR 1025-01E 3 years after all questions have been resolved
Banking Records – Departmental copies	Bank statements, canceled checks, check registers, deposit slips, debit and credit notices, reconciliation, notices of interest earned, monetary transport records (including armored car pickup logs), etc.	GR 1025-28 FE + 5 years
Bid and Bid Documentation - Successful Bids	Successful bids and request for proposals, including invitations to bid, bid bonds and affidavits, bid sheets, and similar supporting documentation. Note: If successful bid or proposal results in a contract, use GR 1000-25.	GR 1075-01A FE + 3 years
Bid and Bid Documentation - Unsuccessful Bids	Unsuccessful Bids	GR 1075-01B 2 years
Budget Documentation - Departmental copies and work papers	Working papers created exclusively for the preparation of budgets, including budget requests, justification statements, and similar documents. Budget change documentation, including line item or contingency/reserve fund transfers and supplemental budget requests. Encumbrance and expenditure reports. Note: Official record copy of Annual Budget filed in City Secretary's Office (permanent retention)	GR 1025-04c 3 years

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Calendars	Calendars used to document appointments or activities of government officials and employees.	GR 1000-45 CE + 1 year Exempt Retention Note: A record of this type purchased with personal funds, but used by a public official or employee to document his or her work activities may be a local government record and subject to this retention period. See Open Records Decision 635 issued in December 1995 by the Texas Attorney General.
Capital Asset Records - Equipment or property inventories	Equipment or property inventories (including sequential number property logs). Information on cost and disposal authorization.	GR 1025-05C US or Disposition + 3 years
Complaints (Service Requests)	Complaints received from the public by a governing body or any officer or employee of a local government relating to government policy. This includes City of Dallas Service Requests. Includes complaints received via e-mail Note: For open record requests, use GR 1000-34A or B	GR 1000-24 Resolution or Dismissal of complaint + 2 years
Contracts, Leases, and Agreements – Contract Administration	Contracts, leases, and agreements, including reports, correspondence, performance bonds, certificates of liability and similar records related to their negotiation, administration, renewal, or termination. Includes Interlocal Agreements with other government agencies. Include bid specifications and proposal received from winning vendor. Except construction contracts, use GR 1075-16A or B	GR 1000-25 AC + 4 years Note: Send an official record copy of the contract to the City Secretary's Office

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Correspondence and Internal Memoranda - Transitory Information	<p>Records of temporary usefulness that are not an integral part of a records series of the office, that are not regularly filed within a 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 City. Transitory records are not essential to the fulfillment of statutory obligations or to the documentation of City functions. Some examples of transitory information, which can be in any medium (voice mail, fax, email, hard copy, etc.) are routine messages; telephone message notifications; internal meeting notices; routing slips; incoming letters or memoranda of transmittal that add nothing of substance to enclosures; and similar routine information used for communication, but not for the documentation, of a specific City transactions.</p> <p><i>Includes unsolicited messages about issues related to City business which are not covered by another record series.</i></p>	<p>GR 1000-26C AV</p> <p><i>Exempt</i></p>
Correspondence and Internal Memoranda - Administrative	<p>Correspondence, internal memoranda pertaining to or arising from routine administrative or operation of the policies, programs, services, or projects of a local government following existing policy and programs.</p>	<p>GR 1 2 years</p>

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Correspondence and Internal Memoranda and Subject Files - Policy and Program Development	Correspondence and internal memoranda pertaining to the formulation, planning, implementation, modification, or redefinition of the policies, programs, services, or projects of a local government including Council Resolutions and Internal Controls. Includes incoming and copies of outgoing correspondence and internal correspondence and memoranda. May also include subject files, which are collections of correspondence, memos, and printed materials on various individuals, activities, and topics. For the actual Policy or Procedure; use GR 1000-38 Note: Includes general subject files not covered under another retention and departmental copies of records for which the official record copy is in the City Secretary's Office	GR 1000-26A 4 years
Criminal History Checks	Used for condition of or in conjunction with employment application.	GR1050-36 End of employee's probationary period or after immediate purpose has been fulfilled, as applicable.
Customer Survey	Surveys returned by the customers or clients of a local government, and the statistical data maintained rating a government's performance.	GR 1000-47 Issuance of report on results of the survey + 3 years
Disciplinary and Adverse Action Records – Civilian Employees	Records created by personnel or supervisory officers in considering or reconsidering on appeal, an adverse action (e.g., demotion, probation, termination, suspension, leave without pay against an employee, including, as applicable, witness and employee statements, interview reports, exhibits, reports of findings and decisions and judgments.	GR 1050-07(3) 2 years after case closed or action taken
Employee Recognition Records	Award committee reports, selection criteria, nomination, and similar administrative records of employee award or incentive programs. For records of awards/commendations given to an employee use GR 1050-12D, 1050-12E, or 1050-12F.	GR 1050-09 2 years

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Employee Selection Records	Interviews, interview questions, upgrades, description, job advertisements, written score, employment applications, transcripts, and letters of reference and similar documents whose submission by candidates for vacant positions or for promotion, transfer, or training opportunity (both hires and not hired).	GR 1050-11C 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
Environmental Protection and Natural Resources Management Plans	Planning reports, background materials and supporting documentation used to provide for the protection of the environment.	PW 5450-02 Permanent
Environmental Quality Review Records	Environmental impact statements and related reports, including background materials and supporting documentation used in preparing statements and reports.	PW 5450-03 Permanent
Facilities -Non-routine maintenance, repair and inspection	Non-routine facility maintenance, repair, and inspection records. Including those relating to plumbing, electrical, fire suppression, and other infrastructure systems. 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	GR 1075-18B2 5 years
Facility Community Right-to-Know Chemical Lists	Copies of Tier II forms containing information about hazardous chemicals present at local government facilities submitted to the fire chief of the fire department having jurisdiction over the facilities and to the Texas Department of State Health Services as required by Health and Safety Code, Section 506.006 and 40 CFR 370	GR 5750-02 30 years.

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Financial Reports – Departmental copies	Monthly, bi-monthly, quarterly or semi-annual financial reports or statement on the accounts, funds, or projects of a local government create either for internal use or for submission to state agencies as may be required by law or regulation, except reports of similar types noted in this or other commission schedules. Including cost allocation and distribution records, annual transaction summaries, and depreciations schedules.	GR 1025-07A FE + 3 years
Grant Development and Administrative Records	Successful grant applications and proposals and any documentation that modified the terms of a grant. Financial, performance, and compliance reports submitted to granting agencies or sub grantor agencies, or documentation supporting these reports.	FE+ 5 years
Grievance Records	Records relating to the review of employee grievances against personnel policies, working conditions, etc.	GR 1050-20 Final decision + 2 years Retention Note: Do not confuse these records with those involving EEO complaints [see item number GR1050-16(c)].
Insurance Policies	Liability, theft, fire, health, life, automobile, and other policies for local government property and personnel, including supporting documentation relevant to the implementation, modification, renewal, or replacement of the policies.	<i>File with and follow retention for appropriate case or project</i>
Inventory Records	Inventory parts records for parts and supplies	GR 1075-02 1 year <i>Exempt</i>

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Job Evaluations	Job evaluations of employees. Note: File by date of review, not in individual employee files.	GR 1050-21 US + 2 years; or date of separation + 2 years, whichever is sooner By regulation – 29 CFR 1620.32(c).
Ledgers, Journals, and Entry Documentation – Departmental copies	General ledger showing receipts and expenditures from all accounts and funds of a local government, subsidiary ledgers, receipts, disbursements, general, or subsidiary journals, journal vouchers and entries or similar posting control forms including supporting documents, amendments correspondence, journal entries, and auditor adjustments.	GR 1025-30 (1) FE + 5 yrs
Legal Opinions	Formal legal opinions rendered by counsel or the Attorney General for a local government, including any written requests for opinions, concerning the governance and administration of a local government. For retention of informal legal opinions and other correspondence provided by counsel see GR1000-26A. Note: For retention of opinions rendered for a Public Information Act Request use GR1000-34A or B.	GR 1000-30 Permanent
Litigation Case Files – Departmental copies	Including all cases to which a local government is a party unless the case file is of a type noted elsewhere in the schedules.	GR 1000-31 AV after decision of a local government not to file a lawsuit or decision that a lawsuit will not be filed against it; 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. <i>Exempt</i>

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Maintenance, Repair and Inspection Records of Vehicles and Equipment -Maintenance and repair records	Records documenting the maintenance and repair to general-purpose vehicles, office equipment, and office facilities. Retention Note: If a vehicle is junked as the result of an accident, retained maintenance & repair records for LA + 1 year. For marked vehicles use PS 4050-04A1	GR 1075-18A2 LA 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.
Maintenance, Repair and Inspection Records of Vehicles, Equipment, and Facilities - Routine	Records documenting routine inspection of vehicles and equipment.	GR 1075-18A1 1 year <i>Exempt</i>
Medical and Exposure Records	Health or physical examination reports or certificates for all applicants and employees if required for position. Includes random drug or alcohol tests.	GR 1050-22A 2 years from the date of creation or personnel action involved, whichever is later. By regulation - 29 CFR 1602.31, 1602.40, and 1602.49.
Minutes (Staff)	Minutes and agendas of internal staff meetings.	GR 1000-32 AV <i>Exempt</i>
Open Record Requests	Non-exempted records and withdrawn requests. Includes correspondence and other documentation related to the request. Including requests received via e-mail	GR 1000-34A Date request for records fulfilled or withdrawn + 1 year. <i>Exempt</i>
Open Record Requests	Exempted records. Includes correspondence and other documentation related to the request. Including requests received via e-mail	GR 1000-34B Date of notification that records requested are exempt from disclosure + 2 years

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Ordinances, Orders, Resolutions – Departmental copies	Ordinances, Orders, Resolutions approved by City Council Note: Official record copy filed in City Secretary's Office (permanent retention)	<i>File with and follow retention for appropriate case or project</i>
Organizational Charts	All organizational charts, lists of employees, contact or call lists, rosters, telephone directories etc.	GR 1000-35 US, expired, or discontinued. <i>Exempt</i>
Payroll Records – Departmental copies	Payroll register, payroll adjustment records, leave records including requests and authorization to use leave. Timesheets.	GR 1050-52c FE + 3 years
Permits and Licenses	Records documenting the application for and the issuance of permits and licenses (including certificates of liability) by a local government for sales, solicitation, facility usage, and similar activities. Except Permits and Licenses listed elsewhere in the schedules.	GR 1000-36 Expiration, cancellation, revocation, or denial + 2 years
Personnel Files – Employee Service Records (Department Personnel File)	Records about an employee. Applications, resume, awards, commendations, certifications, licenses, conflict of interest forms, P-2 forms, training records including training on hazardous materials, etc. Human Resources maintains the official personnel file.	GR 1050-12D Date of Separation + 5 years
Photographs, Recordings, and other Audio or Visual Media	Photographic, photographic scrapbooks, slides, sound recordings, videotapes, posters, and other non-textual media that document the history and activities of the City or any of its departments, programs, or projects, except such records as noted elsewhere in the state schedules.	<i>Transfer to the Archives Collection in the City Secretary's Office when no longer needed in department (permanent retention)</i>
Policy and Procedures Documentation	Orders, directives, manuals, and similar documents that establish and define the policies, procedures, rules, and regulations governing operations or activities of a local government as a whole or any of its departments, programs, services, or projects. Review before disposal; some documentation of this type may merit permanent or long-term retention for historical or legal reasons.	GR 1000-38 US, expired, or discontinued + 5 years.

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Postal and Delivery Service Records	Registered, certified, insured, and special delivery mail receipts and similar records of transmittal by express or delivery companies	<i>File with and follow retention for appropriate case or project to prove delivery</i>
Publications	Pamphlets, reports, studies, proposals, and similar material printed by or for the City or any of its departments, subdivisions, or programs and distributed to or intended for distribution to the public on request and departmental or program newsletters designed for internal distribution. Any publication which receives a PIO number.	<i>Transfer 3 copies to the Archives Collection in the City Secretary's Office as soon as published (permanent retention)</i>
Purchase Order and Receipt Records – Departmental copies	Purchase Orders, requisitions, and receiving reports. Purchasing log, register or similar record providing a chronological record of purchase orders issued, orders received and similar data on procurement status. This also includes P-cards	GR 1075-03A FE + 3 years

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Records of Waste Generators	<p>Authorized discharge to surface water – Records documenting permit, monitoring and processing the surface discharge of wastewater generated from treatment of water contaminated by petroleum substances and discharges to surface waters from locally owned or operated activities including ready-mixed concrete plants, sand, and gravel mining and processing facilities, motor vehicle cleaning facilities’, and petroleum bulk stations and terminals.</p> <p>Hazardous Waste documents. Manifests and shipping papers.</p> <p>Annual summary reports submitted to the Texas Commission on Environmental Quality.</p> <p>Spill Prevention and Control documents whether reported or not to the Texas Commission on Environmental Quality.</p> <p>Used oil filters – Shipping Documentation</p> <p>Whole used or scrap tires – Manifests, work orders, invoices, daily logs, or other documentation used to support activities related to the accumulation, handling and shipment of whole used or scrap tires.</p>	<p>PW 5450-07a 3 years</p>
Reports and Planning Studies – if requested by City Council or submitted to state agency	<p>Reports or Studies (Non-Fiscal) submitted to a state agency as may be required by law or regulation, on the non-fiscal performance of a department, program, or project or for planning purposes, including those prepared by consultants under contract with a local government, except documents of similar types noted in this or other commission schedules.</p> <p>Note: For reports ordered by City Manager, use 1000-26A (5 years) Note: If report is submitted to or considered by Council, as reflected in the minutes, the official record copy is in the City Secretary's Office.</p>	<p>GR 1000-41 A1 Permanent</p>

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Reports and Studies (non-Fiscal) - Activity reports	Activity reports compiled on a daily or other periodic basis pertaining to workload measures, time studies, number of public contacts, etc. except reports of similar types noted in other commission scheduled. Includes tracking logs.	GR 1000-41B 1 year <i>Exempt</i>
Reports and Studies (non-Fiscal) – compiled on less than annual bases	Reports and studies (non-fiscal), monthly, bi-monthly, quarterly, or semi-annual, sub-annual, or irregularly prepared reports, performance audits, or planning studies submitted to the government body required by law or regulation, on the non-fiscal performance of a department.	GR 1000-41A4 3 years
Safety Data Sheets (SDS)	Safety data sheets (SDS) supplied to local government employers by manufacturers or distributors of hazardous chemicals. Workplace chemical lists.	GR 5750-05 US or chemical no longer present <i>Exempt</i>

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Storage Tank System Records	<p>Documentation of compliance with regulations for underground tank systems storing hazardous substances and petroleum substances, and immovable aboveground tanks storing petroleum products.</p> <p>a) Tank registration documents, original and amended certifications for storage tank system installations and financial responsibility, and notifications to storage tank purchaser. Records for upgrading of existing storage tank systems.</p> <p>b) Records of requests for approval of variances or alternative procedures, and documentation of approval of such requests.</p> <p>c) Installation records including general information relating to the installation of new or used storage tank systems and as built drawings or plans depicting the sizes, dimensions, and locations of site features, system components, etc.</p> <p>d) Records for upgrading existing storage tank systems including general information related to the tank integrity assessment and cathodic protection requirements and as-built drawings or plans depicting the sizes, dimensions, and locations of any system components or equipment added.</p> <p>e) Records for repairs and relining. Records of the installation of a used tank including inspection and tank tightness tests required for the reuse of used tanks.</p>	<p>PW 5450-05A Operational life of the storage tank system</p> <p>By regulation - 30 TAC 334.130(b)(1)(A) and 334.10(b)(2)(A).</p>

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Storage Tank System Records – Corrosion protection, release and leak detection components and systems	Documentation of compliance with regulations for underground tank systems storing hazardous substances and petroleum substances, and immovable aboveground tanks storing petroleum products. Including information on the system designer, drawings or plans depicting the locations of all system components, operating instructions and warranty information, maintenance schedules, and testing procedures. a) Installation records relating to the: 1) corrosion protection system, 2) release detection system, spill and overfill prevention equipment.	PW 5450-05F As long as the equipment or system is used. By regulation - 30 TAC 334.49(e)(2)(A)

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Storage Tank System Records – Installation and testing of the system	<p>Documentation of compliance with regulations for underground tank systems storing hazardous substances and petroleum substances, and immovable aboveground tanks storing petroleum products.</p> <p>a) Equipment tests including the air tests and the tightness tests conducted on the tanks and piping:</p> <ol style="list-style-type: none"> 1) at the time of installation, or 2) at the time of upgrading existing storage system, <p>b) Operation and maintenance records of storage tank systems including records related to inspection, servicing, testing, and inventory control.</p> <p>c) Tests and inspections of corrosion protection systems and components.</p> <p>d) Results of sampling, testing, or monitoring of releases (including tank tightness tests); records and calculations related to inventory control reconciliation; and documentation of service, calibration, maintenance, and repair of release detection equipment.</p> <p>e) Records of servicing, calibration, maintenance, and repair of spill and overfill equipment.</p> <p>f) Transfer or inventory records documenting the basis for claiming an exemption from the spill and overfill equipment requirements, if applicable.</p> <p>g) Results of inspections, tests, and maintenance activities for repairs and relining.</p> <p>h) Documentation of compliance with requirements for the temporary removal from service of a storage tank.</p>	<p>PW 5450-05C(2) 5 years</p> <p>By regulation - 30 TAC 334.46(i)(3).</p>

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Storage Tank System Records – Removal of System	Documentation of compliance with requirements for the permanent removal from service of a storage tank.	PW 5450-05L As long as any underground storage tank remains in service at the facility or 5 years after the storage tank system is permanently removed from service, whichever longer By regulation - 30 TAC 334.46(i)(3).
Usage Reports - If reports used for allocating costs	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. Reports of usage of facilities, vehicles, and equipment	GR 1075-20A FE + 3 years
Vehicle Assignment Records	Assignment logs, authorizations, and similar records relating to the assignment and use of government-owned vehicles or equipment by employees.	GR 1075-21 After return or reassignment + 2 years.
Visitor Control Registers	Logs, registers, or similar records documenting visitors to limited access or restricted areas.	GR 1075-22 3 years
Warranties	Warranty for vehicles and equipment.	GR 1075-23 Expiration of warranty + 1 year Exempt
Work papers used to create Reports and Planning Studies – if requested by City Council or submitted to state agency	Working papers and raw data used to create any report for reports and studies (non-fiscal), monthly, bi-monthly, quarterly, or semi-annual, sub-annual, or irregularly prepared reports, performance audits, or planning studies submitted to the government body required by law or regulation, on the non-fiscal performance of a department.	GR 1000-41A(5) 3 years

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Work Schedules	Work, duty, shift, crew, or case schedule, rosters, or assignments.	GR 1050-31 1 year <i>Exempt</i>
Workers Compensation Claim Files – Department Copy	RM1A claims, TWCC reports, salary continuation, doctors’ reports, Order for Medical Treatment (OMTs), all notes from meetings or phone conversations. Note: Human Resource copy retained 50 years.	GR 1050-32A CE + 5 years By regulation - 29 CFR 1904.33
Workplace Chemical Lists	List of hazardous chemicals, including superseded lists, compiled and maintained by local governments in accordance with the Health and Safety Code, Section 552.005	GR 5750-06 30 years By law - Health and Safety Code, Section 502.005(d).

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Equipment and Fleet Management

Reviewed by: Peter Kurilecz Nov 25, 2020
Peter Kurilecz Date
Records Management Officer
City Secretary's Office

Approved by: Donzell Gipson Nov 25, 2020
Donzell Gipson Date
Director
Equipment and Fleet Management

Revisions 9/10/20 to reflect changes in Texas State Library schedules with revised descriptions, retention numbers, retention periods and new record series

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