

Information & Technology Services Records Retention Schedules

Records Series Title	Records & Comments	State Retention Number; Legal Retention Requirement
Ordinances, Orders, Resolutions – Departmental copies	Ordinances, Orders, Resolutions approved by City Council <i>Note: Official record copy filed in City Secretary's Office (permanent retention)</i>	<i>File with and follow retention for appropriate case or project</i>
Contracts, Leases, and Agreements – Departmental copies	Approved change orders or amendments to contracts and statistical or performance reports related to executed contracts or Interlocal Agreements. <i>NOTE: Departmental copies of the following can be discarded prior to the end of the retention period: 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.</i>	GR 1000-25 AC + 4 years Note: Statistical or Performance Reports are kept for 1 year. <i>The official record copy of the contract should be filed with the City Secretary's Office</i>
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 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. <i>For the actual Policy or Procedure; use GR 1000-38</i> <i>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</i>	GR 1000-26A 4 years
Correspondence and Internal Memoranda – Administrative	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.	GR 1000-26B 2 years

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Correspondence and Internal Memoranda – Transitory Information	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. Includes unsolicited messages about issues related to City business which are not covered by another record series.	GR 1000-26C Until the purpose of record has been fulfilled <i>Exempt</i>
Legal Opinions	Formal legal opinions rendered by counsel or the Attorney General for local government, including any written requests for opinions, concerning the governance and administration of a local government. <i>For retention of informal legal opinions and other correspondence provided by counsel see GR1000-26A.</i> <i>Note: For retention of opinions rendered for a Public Information Act Request use GR 1000-34A or B.</i>	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 1 year after final disposition of case <i>Exempt</i>
Minutes (Staff)	Minutes and agendas of internal staff meetings.	GR1000-32 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. <i>Note: Official copy filed with Public Information Office.</i>	GR 1000-34A 1 year after final decision on request <i>Exempt</i>

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Open Records Requests	Exempted records. Includes legal opinion, correspondence and other documentation related to the request. Including the requests received via e-mail.	GR 1000-34B 2 year after notification that records are exempt from disclosure
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>
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 <i>Except those listed elsewhere in the schedules.</i>	GR 1000-36 Expiration, cancellation, revocation, or denial + 2 years
Policy and Procedures Documentation (including Data Processing Policies)	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. Records of data processing policies and procedures including those covering access and security, systems development, data retention and disposition, and data ownership. Records of procedures for data entry, operation of computer equipment, production control, system backup, compliance with electronic records rules, etc. Does not include technical documentation of procedures necessary for reading or processing of electronic records (see item number 5800-08). <i>Review before disposal; some documentation of this type may merit permanent or long-term retention for historical or legal reasons.</i>	GR 1000-38 US, expired, or discontinued + 5 years
Calendars	Calendars used to document appointments or activities of government officials and employees.	GR 1000-45 CE + 1 year <i>Exempt</i>
Customer Service Survey	Customer Service Survey Cards	GR 1000-47 Issuance of report on results of the survey + 3 years

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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 Auditors. <i>Includes Internal Control Reports.</i> <i>Note: Official record copy of Audit Reports filed in City Secretary's Office (permanent retention)</i>	GR 1025-01E 3 years after all questions have been resolved
Budget Documentation - Departmental copies and work papers	Working papers created exclusively for the preparation of department and citywide budgets, including budget requests, CIS Chargeback's, justification statements and similar documents. Budget change documentation, including line item or contingency/reserve fund transfers and supplemental budget requests. Encumbrance and expenditure reports. <i>Note: Official record copy of Annual Budget filed in City Secretary's Office (permanent retention)</i>	GR 1025-04F 3 years
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
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 1025-26 FE + 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. Includes cash receipts, cash reports, and deposits.	GR 1025-27A FE of date of receipt + 3 years for other governments
Banking Records – Departmental copies	Bank statements, canceled checks, deposit slips, debit and credit notices, reconciliation, notes of interest earned, monetary transport records (including armored car pickup logs), etc.	GR 1025-28 FE + 5 years

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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 1050-07C 2 years after case closed or action taken
Employee Recognition Records	Award committee reports, selection criteria, nominations, and similar administrative records of employee award or incentive programs. <i>For records of awards/commendations given to an employee use GR 1050-12D, 1050-12E or 1050-12F.</i>	GR 1050-09 2 years
Employee Security Records	Records created to control and monitor the issuance of keys, identification cards, passes or similar instruments of identification and access.	GR 1050-10 US, expiration or date of separation + 2 years
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
Personnel Files – Employee Service Records (Departmental Personnel Files)	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 <i>Note: If employee transfers to another city department send file to the new department. Human Resources maintains the official personnel file</i>	GR1050-12 Date of separation + 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
Job Evaluations	Job evaluations of employees. <i>Note: File by date of review, not in individual employee files.</i>	GR 1050-21B US + 2 years; or date of separation + 2 years, whichever is sooner
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

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Training and Educational Achievement Records	Certificates of completion, transcripts, test scores, or similar reports documenting the training, testing, or continuing education achievements of an employee if such training or testing is required for the position held or if could affect career advancement. <i>Note: If information concerning training or testing is transferred to an Employee Service Record (GR 1050-12), the document only needs to be retained for 2 years</i> *GR 5825-17 Withdrawn	GR 1050-28A Date of separation + 5 years
Training and Educational Achievement Records	Records documenting the planning, development, implementation, administration and evaluation of in-house training programs *GR 5825-17 Withdrawn	GR 1050-28B 2 years
Training and Educational Achievement Records	Training manuals, syllabuses, course outlines, and similar training ads used in in-house training programs *GR 5825-17 Withdrawn	GR 1050-28C US, expired, or discontinued + 2 years
Work Schedules – Departmental Copy	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. <i>Note: Human Resource copy retained 50 years.</i>	GR 1050-32A CE of closure of claim + 5 years
Payroll Records – Departmental copies	Payroll register, payroll adjustment records, leave records including requests and authorization to use leave. Timesheets.	GR 1050-52 FE + 3 years
Inventory Records	Inventory parts records for parts and supplies	GR 1075-02 1 year <i>Exempt</i>

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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	GR 1075-03A FE + 3 years
Accident and Damage Reports (Property) – Departmental copies	Reports of accidents or damage to facilities, vehicles, or equipment if no personal injury is involved. <i>Note: For accidents that result in injury to persons, use GR 1000-20 A or B (5 or 20 years)</i>	GR 1075-15 3 years
Lost and Stolen Property Reports	Lost and Stolen Property reports	GR 1075-17 FE + 3 years
Maintenance, Repair and Inspection Records of Vehicles, Equipment, and Facilities – Routine	Records documenting routine inspection of facilities, vehicles and equipment. Routine cleaning, janitorial and inspection work	GR 1075-18A1 1 year <i>Exempt</i>
Maintenance, Repair and Inspection Records of Vehicles and Equipment -Maintenance and repair records	Records documenting the maintenance and repair to non-Police vehicles, general-purpose vehicles, office equipment, and office facilities. <i>Note: If a vehicle is junked as the result of an accident, retained maintenance & repair records for LA + 1 year.</i>	GR 1075-18A2 LA
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. .	GR 1075-18B2 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.
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

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Usage Reports – Reservation logs, Vehicle Assignment Records	Reservation logs or similar records relating to the use of facilities such as meeting rooms, auditoriums, etc. by the public or other governmental agencies. Assignment logs, authorizations, and similar records relating to the assignment and use of government-owned vehicles or equipment by employees.	GR 1075-20B 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
Telephone Logs or Activity Reports - If used for internal control purposes	Registers or logs of telephone calls made and similar telephone activity reports if the log, report, or similar record is used for internal control purposes other than cost allocation.	GR 1075-41B 1 years
Material Safety Data Sheets (MSDS)	Material safety data sheets (MSDS) supplied to local government employers by manufacturers or distributors of hazardous chemicals.	GR 5750-05 US or chemical no longer present <i>Exempt</i>
Disaster Preparedness and Recovery Plans	Disaster preparedness, continuity of operations, business continuity, or other plans used to prepare or respond to emergencies or disasters Replaces GR 5825-07	GR 5750-07 US
Audit Trail Records	Files needed for electronic data audits such as files or reports showing transactions accepted, rejected, suspended, and/or processed; history files/tapes; records of on-line updates to application files or security logs.	GR 5800-01 GR5800-01 Until audit requirements met.
Finding Aids, Indexes, and Tracking Systems	Automated indexes, lists, registers, and other finding aids used to provide access to the hard copy and electronic records.	GR 5800-02 Until the related hard copy or electronic records have been destroyed.

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<p>Hardware Documentation</p> <p>Software Programs</p> <p>Technical Documentation</p> <p>Operating System and Hardware Conversion</p>	<p>Records documenting operational and maintenance requirements of computer hardware such as operating manuals, hardware/operating system requirements, hardware configurations, and equipment control systems. Automated software applications and operating system files including job control language, program listing/source code, etc.</p> <p>Records adequate to specify all technical characteristics necessary for reading or processing of electronic records and their timely, authorized disposition including documentation describing how a system operates and necessary for using the system such as user guides, system or sub-system definitions, system specifications, input and output specifications, and system flow charts; program descriptions and documentation such as program flowcharts, program maintenance logs, change notices, and other records that document modifications to computer programs; and data documentation necessary to access, retrieve, manipulate and interpret data in an automated system such as a data element dictionary, file layout, code book or table, and other records that explain the meaning, purpose, structure, logical relationships, and origin of the data elements.</p> <p><i>Note: If the retention period of electronic records is extended to meet requirements of an audit, litigation, open records action, etc. any hardware documentation required to retrieve and read the records must also be retained for the same period.</i></p>	<p>GR 5800-03 Until electronic records are transferred to and made usable in a new hardware environment, or there are no electronic records being retained to meet an approved retention period that require the hardware to be retrieved and read. Retention Note: If the retention period of electronic records is extended to meet requirements of an audit, litigation, Public Information Act request, etc., any hardware documentation required to retrieve and read the records must also be retained for the same period.</p>
<p>Information System/Database Records</p>	<p>Relatively long-lived computer files, including databases, containing organized and consistent sets of complete and accurate electronic records</p> <p><i>Notes: The need to retain “snapshots” of some continuing information systems or databases should be carefully evaluated, making sure they support records on all schedules and are retained for the full retention period of those records.</i></p>	<p>GR 5800-04 Until electronic records are transferred to and made usable to a new system environment or the files have met a retention period already established.</p>

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Processing Records	<p>Electronic files used to produce or modify an information system or database, but not limited to, work files, maintenance and test files, print files, and intermediate input/output records.</p> <p><i>Note: Routine or benchmark files used to test system performance and files which facilitate processing of a particular job or system run, but which do not add to, delete from, or substantially modify information in an information system or database need be retained only as long as administratively valuable.</i></p>	<p>GR-5800-05 Until electronic records are transferred to and made usable in a new system environment, or the files have met a retention period established in this or other commission schedule, whichever sooner.</p>
Software Programs	<p>Automated software applications and operating system files including job control language, etc.</p> <p><i>Note: If the retention period of electronic records is extended to meet requirements of an audit, litigation, Public Information Act request, etc. any software program required to retrieve and read the records must also be retained for the same period.</i></p>	<p>GR 5800-06 Until electronic records are transferred to and made usable in a new software environment, or there are no electronic records being retained to meet an approved retention period that require the software to be retrieved and read.</p>

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Technical Documentation	<p>Records adequate to specify all technical characteristics necessary for reading or processing of electronic records and their timely, authorized disposition. Includes documentation describing how a system operates and which is necessary for using the system such as user guides, system or sub-system definitions, system specifications, input and output specifications, and system flow charts; program descriptions and documentation such as program flowcharts, program maintenance logs, change notices, and other records that document modifications to computer programs; and data documentation necessary to access, retrieve, manipulate and interpret data in an automated system such as a data element dictionary, file layout, code book or table, and other records that explain the meaning, purpose, structure, logical relationships, and origin of the data elements.</p> <p><i>Note: If the retention period of electronic records is extended to meet requirements of an audit, litigation, open records action, etc., any technical documentation required to retrieve and read the records must also be retained for the same period</i></p>	<p>GR 5800-08 Until electronic records are transferred to and made usable in a new hardware or software environment with new documentation, or there are no electronic records being retained to meet an approved retention period that require the documentation to be retrieved and read.</p>
Automated Program Listing / Source Code	Automated program code and builds which generate the machine-language instructions used to operate software programs.	<p>GR 5800-09 Until superseded or software program no longer used, whichever sooner.</p>
Access Security Records	Records created for security purposes to control or monitor individual access to a system and its data, including but not limited to user account records, security login information, and password files. <i>See also Employee Security Records 1050-10.</i>	GR 5825-01 Retain until all audit or legal Requirements have been met.
System Security Records	Records created for security purposes to control or monitor individual access to a system and its data, including but not limited to user accounts records, login information, and password files.	<p>GR 5825-01A US, date of expiration, or date of separation + 2 years, as applicable</p>

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System Security Records	Records used to control and monitor the security of a system and its data, including vulnerability scans, intrusion tests, malicious code detection tests, threat and risk assessments, technical security reviews, patch management logs, intrusion detection logs, firewall logs, and related records. Records documenting incidents and investigations involving unauthorized attempted entry, probes and/or attaches on information systems or networks.	GR 5825-01B AV
Batch Data Entry Control Records	Forms and logs used to reconcile batches submitted for processing against batches received and processed.	GR 5825-02 AV after reconciliation confirmed <i>Exempt</i>
Chargeback Records to Data Processing Service users	Records used to document, calculate costs and bill program units for computer usage and data processing services. These records are also used for cost recovery, budgeting, or administrative purposes.	GR 5825-03 FE + 3 years
Computer Job Schedules and Reports	Schedules or similar records showing computer jobs to be run and other reports by computer operators or programmers of work performed.	GR 5825-04 90 days <i>Exempt</i>
Data Processing Planning Records	Reports, studies, analyses, projections, and similar records concerning the creation, development, or modification of data processing systems and services except for disaster recovery plans. <i>Note: Before disposal appraise for continuing administrative usefulness and historical value. Those records related to major development projects and other records considered of historical value should be retained permanently.</i>	GR 5825-06 5 years
Electronic Media Library System Records	Records used to control the location, maintenance, and disposition of media in an electronic media library <i>except</i> for records destruction documentation that is maintained permanently (<i>i.e. File backup catalog</i>).	GR 5825-08 Retain until related records or media are destroyed or withdrawn from the library.

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Input Documents Source Documents for Electronic Record	Copies of records or forms designed and used solely for data input and control when the data processing unit provides centralized data input services and original records are maintained by the program unit <i>except</i> for data entry documents noted elsewhere in this schedule or other schedules adopted by the commission (<i>i.e. batch jobs, backup jobs, SAR</i>).	GR 5825-09 90 days or until superseded <i>Exempt</i>
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. Records used to implement a computer network including reports, diagrams of network, and wiring schematics	GR 5825-10 US <i>Exempt</i>
Operating System and Hardware Conversion Plans	Records relating to the replacement of equipment or computer operation systems not included elsewhere in this schedule	GR 5825-12 2 years after completion of the conversion
Output Records for Computer Production (CIS Customers)	Reports showing transactions that were accepted, rejected, suspended, and/or processed (<i>i.e. mainframe</i>).	GR 5825-13 AV <i>Exempt</i>
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.	GR 5825-14 90 days Retain until no longer needed as an audit trail
Project Files – Project Management Records	Records created and used in the development, redesign, or modification of automated systems or applications. a) Project management records, design documentation, feasibility studies, justifications, user requirements, etc. <i>Note: Does not include purchasing records for computer software or hardware such as individual personal computers.</i>	GR 5825-15A 3 years after completion of project

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Project Files – Routine Status Reports	Routine status reports, memos, and correspondence about projects.	GR 5825-15B AV <i>Exempt</i>
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.	GR 5825-16 AV <i>Exempt</i>
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.	GR 5825-18 AV <i>Exempt</i>
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.	GR 5825-19 AV <i>Exempt</i>
Software Registrations, Warranties, and License Agreements	Software Registrations, Warranties, and License Agreements	GR 5825-20 LA + 3 years

Reviewed by: *Michael J. Barrett* Nov 4, 2020
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Approved by: *William Zielinski* Nov 4, 2020
William Zielinski (Nov 4, 2020 08:00 CST)
 William Zielinski Date
 Director, Chief Information Officer
 Information & Technology Services

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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