

Mayor & City Council Offices Records Retention Schedule

Records Series Title	Records & Comments	State Retention Number Legal Retention
Proclamations	Proclamations/special recognitions/congratulatory letters	GR 1000-07 2 years
Service Requests	Service requests or complaints	GR 1000-24 Resolution or Dismissal of complaint + 2 years
Correspondence and Internal Memoranda and Subject Files - Policy and Program Development	<p>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. <i>For the actual Policy or Procedure; use GR 1000-38</i> <i>Note: Includes general subject files and copies of information provided to Council members by city departments related to issues in their districts.</i></p> <p>Attendance reports Board and commission applicants Budget Building inspection DART Economic development correspondence General subject files Records of council meetings Zoning cases</p>	GR 1000-26A 4 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 (1 year or less) <i>Exempt</i>
Minutes (Staff)	Minutes and agendas of internal staff meetings.	GR 1000-32 1 year <i>Exempt</i>
Open Record Requests – No Exempt Records	Non-exempted records and withdraw request. Includes correspondence and other documentation related to the request including requests received via mail.	GR 1000-34A 1 year after final decision on request <i>Exempt</i>
Open Record Requests – Exempt Records	Exempted records. Includes legal opinion, correspondence and other documentation related to the request. Including 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, etc.	GR 1000-35 US, expired, or discontinued <i>Exempt</i>

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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. <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 AC + 3 years
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 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. <i>Note: Official record copy of Annual Budget filed in City Secretary's Office (permanent retention)</i>	GR 1025-04F 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

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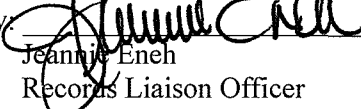
Records Series Title	Records & Comments	State Retention Number Legal Retention
Accounts Receivable Records – Departmental copies	Records documenting the receipt of any monies by a local government that are remittable to the State Comptroller of Public Accounts. Including cash receipts, cash reports, and deposits.	GR 1025-27B FE + 5 years
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 FE + 5 yrs
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 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 (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. <i>Note: If employee transfers to another city department send file to the new department.</i>	GR 1050-12D 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

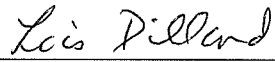
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Payroll Records – Departmental copies	Payroll register, payroll adjustment records, leave records including requests and authorization to use leave. Timesheets.	GR 1050-52 FE + 3 years
Bid and Bid Documentation - Successful Bids	Successful bids and request for proposals, including invitations to bid, bid bonds and affidavits, bid sheets, and similar supporting documentation. <i>Note: If successful bid or proposal results in a contract, use GR 1000-25 (AC + 4 years)</i>	GR 1075-01A FE + 3 years
Bid and Bid Documentation - Unsuccessful Bids	Unsuccessful Bids	GR 1075-01B 2 years
Inventory Records	Inventory parts records for parts and supplies	GR 1075-02 1 year <i>Exempt</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	GR 1075-03A FE + 3 years
Telephone Logs or Activity Reports	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 2 years

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Revisions 10/21/2015 to reflect changes in Texas State Library schedules.

Revisions 7/12/11 to reflect changes in Texas State Library schedules with revised descriptions, retention numbers, retention periods and new record series.

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Revision Date: 10/21/2015