

Street Services Department Records Retention Schedules

Division	Records Series Title	Records & Comments	State Retention Number Legal Retention
Environmental Fleet	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>
SMA TRN	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>
Fleet	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>
TRN	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>
SMA SRD TRN	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>
TRN	Petitions	Petitions from the public to the governing body or subsidiary boards or commissions of a local government. Note: Retention period begins after work is completed or when decision is made that no action is necessary.	GR 1000-06 Consideration of the petition + 2 years

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Fleet SMA SRD TRN	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.	GR 1000-20A 3 years
Fleet SMA SRD TRN	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.	GR 1000-20B 20 years
CFI/Admin Fleet SMA SRD TRN	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. <i>Includes complaints received via e-mail</i> <i>Note: For open record requests, use GR 1000-34</i>	GR 1000-24 Resolution or Dismissal of complaint + 2 years
CFI/Admin Fleet ROW Maintenance SRD TRN	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. <i>Except construction contracts, use GR 1075-16A or B</i>	GR 1000-25 AC + 4 years <i>Note: Send an official record copy of the contract to the City Secretary's Office</i>

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CFI/Admin Environmental Fleet PSI ROW Maintenance SMA SRD TRN	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. <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
CFI/Admin	MIS Historical	Activity codes for equipment, labor, materials, lane miles, etc. used to allocate the cost associated to street repair.	GR 1000-26A2 25 years
CFI/Admin SMA Environmental Fleet ROW Maintenance SMA SRD TRN	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 year

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CFI/Admin Fleet ROW Maintenance SMA SRD TRN	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. <i>Includes unsolicited messages about issues related to City business which are not covered by another record series.</i>	GR 1000-26C Until the purpose of record has been fulfilled <i>Exempt</i>
CFI/Admin Fleet TRN	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. <i>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.</i>	GR 1000-30 Permanent
CFI/Admin Fleet TRN	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>

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CFI/Admin Environmental Fleet	Minutes (Staff)	Minutes and agendas of internal staff meetings.	GR 1000-32 1 year <i>Exempt</i>
CFI/Admin Fleet SMA TRN	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 1 year after final decision on request <i>Exempt</i>
CFI/Admin Fleet SMA TRN	Open Record Requests	Exempted records. Includes legal opinion, correspondence and other documentation related to the request. Including request received via e-mail.	GR 1000-34B 2 years after notification that records are exempt from disclosure
CFI/Admin Fleet SMA SRD TRN	Organizational Charts	All organizational charts, lists of employees, contact or call lists, rosters, etc.	GR 1000-35 US , expired, or discontinued <i>Exempt</i>
TRN	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 Permits and Licenses listed elsewhere in the schedules.</i>	GR 1000-36 Expiration, cancellation, revocation, or denial + 2 years.
CFI/Admin Environmental Fleet PSI ROW Maintenance SMA SRD TRN	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

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CFI/Admin Environmental Fleet SMA SRD TRN	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
CFI/Admin Environmental Fleet SMA SRD TRN	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 1000-41A5 3 years
CFI/Admin Fleet SMA SRD TRN	Work papers used to create Reports and Studies (non-Fiscal) – compiled on less than annual bases	Working papers and raw data used to create any report for 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 1000-41A6 1 year
CFI/Admin Fleet SMA SRD TRN	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 and SCADA pump activity.	GR 1000-41B 1 year <i>Exempt</i>
CFI/Admin Environmental Fleet ROW Maintenance SMA SRD TRN	Calendars	Calendars used to document appointments or activities of government officials and employees.	GR 1000-45 CE + 1 year

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Division	Records Series Title	Records & Comments	State Retention Number Legal Retention
Fleet SMA	Customer Service Survey	Customer Service Survey Cards	GR 1000-47 AC + 3 years
CFI/Admin Environmental Fleet	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
CFI/Admin Environmental Fleet SMA SRD TRN	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
Fleet ROW Maintenance TRN	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
CFI/Admin SMA TRN	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
CFI/Admin TRN	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 subgrantor agencies, or documentation supporting these reports.	GR 1025-08 FE + 5 years

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CFI/Admin Environmental Fleet PSI ROW Maintenance SMA TRN	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
TRN	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
CFI/Admin	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
CFI/Admin Fleet	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
CFI/Admin Environmental Fleet ROW Maintenance SMA SRD TRN	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

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Division	Records Series Title	Records & Comments	State Retention Number Legal Retention
CFI/Admin	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
CFI/Admin Environmental Fleet ROW Maintenance SMA SRD TRN	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
CFI/Admin Environmental Fleet TRN	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
CFI/Admin Environmental Fleet ROW Maintenance SMA SRD TRN	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.	GR 1050-12D Date of Separation + 5 years
CFI/Admin Fleet SMA SRD TRN	Grievance Records	Records relating to the review of employee grievances against personnel policies, working conditions, etc.	GR 1050-20 Final decision + 2 years

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CFI/Admin Fleet ROW Maintenance SMA SRD TRN	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
CFI/Admin Fleet	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 creation or personnel action involved, whichever is later
CFI/Admin Environmental Fleet ROW Maintenance SMA SRD TRN	Work Schedules	Work, duty, shift, crew, or case schedule, rosters, or assignments.	GR 1050-31 1 year <i>Exempt</i>
CFI/Admin Fleet TRN	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
CFI/Admin Fleet ROW Maintenance TRN	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.</i>	GR 1075-01A FE + 3 years
CFI/Admin Fleet ROW Maintenance TRN	Bid and Bid Documentation - Unsuccessful Bids	Unsuccessful Bids	GR 1075-01B 2 years

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CFI/Admin Fleet SMA SRD	Inventory Records	Inventory parts records for parts and supplies	GR 1075-02 1 year <i>Exempt</i>
CFI/Admin Environmental Fleet ROW Maintenance SMA SRD TRN	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
CFI/Admin Environmental Fleet ROW Maintenance SMA SRD TRN	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.</i>	GR 1075-15 3 years

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TRN	Construction Project Files	Records concerning the planning, design, construction, conversion, or modernization of local government-owned facilities, structures, and systems, including feasibility, screening, and implementation studies; topographical and soil surveys and reports; architectural and engineering drawings, elevations, profiles, blueprints, and as-builts; inspection and investigative reports; laboratory test reports; environmental impact statements; construction contracts and bonds; correspondence; and similar documentation; <i>except as described in 1075-16B or 1075-16C.</i> <i>Note: If a structure, facility, or system is sold or transferred to another person or entity, the local government must retain the original records relating to its construction. Copies of the records may be given to the person or entity to whom the structure, facility, or system is sold or transferred.</i>	GR 1075-16A Permanent <i>Note: Send an official record copy of the contract to the City Secretary's Office</i>
Environmental Fleet ROW Maintenance SMA	Lost and Stolen Property reports	Lost and Stolen Property reports	GR 1075-17 FE + 3 years
CFI/Admin Environmental Fleet PSI ROW Maintenance SMA SRD TRN	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>

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ROW Maintenance Fleet	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
Fleet SMA SRD	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
Fleet	Vehicle Assignment Records	Assignment logs, authorizations, and similar records relating to the assignment and use of government-owned vehicles by employees.	GR 1075-21 2 years
Environmental Fleet	Warranties	Warranty for vehicles and equipment.	GR 1075-23 Expiration of warranty + 1 year
CFI/Admin Fleet SMA SRD TRN	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 2 years
CFI/Admin Environmental Fleet SMA	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>
ROW Maintenance	Street cleaning Records	Reports, logs, or similar records documenting street cleaning operations.	PW 5275-05 1 year <i>Exempt</i>

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TRN	Service Requests/Work Orders	Service requests, work orders, complaints from the public or from other local government department on street hazards, potholes, other needed repairs on roads, streets and rights of way and requests for traffic signs, lights, changes to traffic flow, etc.	PW 5200-02 2 years
TRN	Applications and Permits-Cut Permits and Roads, Streets, Sidewalks Granted Permits	Applications for and copies of permits (or record of their issuance) involving excavation and fill; alterations to roads, streets, sidewalks, and curbs; and for similar activities involving alteration of streets and rights of way, sign installation, fencing, swimming pool construction, driveway construction, and for similar activities as might be required by local ordinance.	PW 5250-10A 5 years
TRN	Roads, streets, street lights, sidewalks, rights of way, etc. - Maintenance and Inspection Records	Reports, logs, or similar records, compiled on a daily, weekly, and/or monthly basis documenting repair and maintenance work and inspection for roads, streets, street lights, sidewalks, rights of way, etc.	PW 5275-01A 3 years
CFI/Admin SRD	Inspection Reports and/or Project Files	Reports, logs, or similar records, compiled on a daily, weekly, and/or monthly basis documenting repair and maintenance work on roads, streets, street lights, sidewalks, rights-of-way, etc.	PW 5275-07A 3 years
TRN	Accident Reports Used for Traffic Flow Design	Reports, usually supplied by the police department, of traffic accidents used to monitor, redevelop, or redesign streets, intersection, speed limits, signal timing, directional flow patterns, etc.	PW 5300-01 2 years
SMA TRN	Special Events Files	Reports, notifications, planning documents, and similar records used in the preparation for special events such as parades, motorcades, demonstrations, or situations resulting in unusually heavy traffic or street use requiring street closures, traffic rerouting, barricades, signal timing changes, etc.	PW 5300-02 2 years

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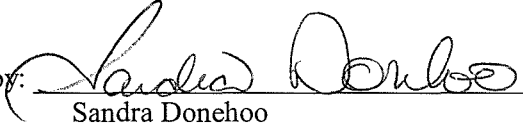
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TRN	Traffic Count Reports	Reports of traffic passage on streets, roads, bridges, intersections, etc. or use of local government owned parking lots or structures.	PW 5300-03 10 years
TRN	Traffic Devices Installation & Maintenance	Installation, inspection, testing, maintenance, repair, or replacement of traffic signs, signals, and signal boxes. Reports, logs, or similar records.	PW 5300-04A 5 years
TRN	Traffic Devices Pavement Markings	Painting, inspection, or repainting of pavement and curb markings	PW 5300-04B 2 years
TRN	Traffic Permits	Applications for and copies of permits for special parking, house moving, over dimensional movements, and similar permits and permissions issued by or that concern traffic engineering departments.	PW 5300-05 Expiration, cancellation, revocation, or denial of the permit + 2 years
TRN	Street Name and House Number Files	Records relating to street dedications, street closings, the assignment and alteration of street names and house numbers, and similar records that provide official control of the naming and numbering of streets and roads.	PW 5275-06 PERMANENT.
TRN	Road and Street Master Record	Master record in some form of every road and street providing a description, history, and classification of each.	PW 5275-08 PERMANENT.
TRN	Traffic Signs and Signal - Records and Inventories	Drawings, wiring diagrams, code and circuit numbers, and similar data on traffic signal components.	PW 5300-06 LA
TRN	Traffic Signs and Signals and Parking Device Inventory Records	Records providing an inventory of all installed traffic signs and signals showing type of equipment or sign, location, date of installation, and similar data. If an inventory is maintained on cards, databases, or similar medium that permits purging. Registers, index cards, or similar records providing an inventory of meters, toll gates, or other parking control devices showing location, type of equipment, date of installation, and similar data. If an inventory is maintained on cards, databases, or similar medium that permits purging.	PW 5300-07B Permanent, but purge records relating to junked equipment.

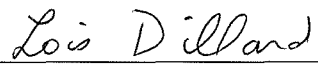
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Records Liaison Officer
Street Services

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City Secretary's Office

Approved by:  11/24/2015 Date
Dennis Ware
Director
Street Services

Revisions November 24, 2015 to reflect changes in Texas State Library schedules with revised descriptions, retention numbers, and retention periods.

Revisions June 9, 2011 to add Transportation (formerly PWT) and to reflect changes in Texas State Library schedules.

Revisions August 18, 2014 to add several record series.

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