

**Trinity Watershed Management Department
Records Retention Schedule**

Division	Record Title	Record Description & Comments	State Record Number & Retention Period
CBU FC FP SWM TRCP	Ordinances, Orders, Resolutions - Departmental copies	Ordinances, Orders, Resolutions approved by City Council Note: Official record copy filed in City Secretary's Office (permanent retention) Note: If a part of a project/case, file with appropriate project file and follow retention using GR 1075-16A or B	GR1000-05 Permanent
CBU FC FP SWM TRCP	Petitions	Petitions from the public to the governing body or subsidiary boards or commissions of a local government. Note: "Final action" includes a decision to take no further action on a petition.	GR 1000-06 Final action on the petition + 2 years
CBU FC FP SWM TRCP	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 1000-34	GR 1000-24 Resolution or Dismissal of complaint + 2 years
CBU FC FP SWM TRCP	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, 1075-16A2, or 1075-16B	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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CBU FC FP SWM TRCP	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. May also include subject files, which are collections of correspondence, memos and printed materials on various individuals, activities and topics.</p> <p><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></p>	GR 1000-26A 4 years
CBU FC FP SWM TRCP	Correspondence and Internal Memoranda - Administrative	Correspondence, internal memoranda pertaining to or arising from routine administrative or operation of the policies, programs, services, of a local government following existing policy and programs.	GR 1000-26B 2 years

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CBU FC FP SWM TRCP	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>	GR 1000-26C Until the purpose of record has been fulfilled Exempt
CBU FC FP SWM TRCP	Legal Opinions	<p>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.</p> <p><i>For retention of informal legal opinions and other correspondence provided by counsel see GR1000-26A.</i></p> <p><i>Note: For retention of opinions rendered for a Public Information Act Request use GR1000-34A or B.</i></p>	GR 1000-30 Permanent
CBU FC FP SWM TRCP	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 Exempt

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CBU FC FP SWM TRCP	Minutes (Staff)	Minutes and agendas of internal staff meetings.	GR 1000-32 1 year Exempt
CBU FC FP SWM TRCP	Open Record Requests - Non-exempted records	Non-exempted records and withdrawn requests. Includes correspondence and other documentation related to the request. Including requests received via e-mail. If they are project related, they must remain as part of the contract.	GR 1000-34A 1 year after final decision on request Exempt
CBU FC FP SWM TRCP	Open Record Requests - Exempted records	Exempted records. Includes legal opinion, correspondence and other documentation related to the request. Including requests received via e-mail. CAO notifies if records are exempt.	GR 1000-34B 2 years after notification that records are exempt from disclosure
CBU FC FP SWM TRCP	Organizational Charts	All organizational charts, lists of employees, contact or call lists, rosters, telephone directories, etc.	GR 1000-35 US, expired, or discontinued Exempt
CBU FC FP SWM TRCP	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. Variance of land use regulations, petitions for granted petitions (fill permits) PW 5400-02A.</i>	GR 1000-36 As long as variance in effect + 2 years

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CBU FC FP SWM TRCP	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>Note: Transfer to the Archives Collection in the City Secretary's Office when no longer needed in department. Review before disposal, some records may merit PERMANENT retention for historical reasons.</i>	GR1000-37 As long as administratively valuable
CBU FC FP SWM TRCP	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
CBU FC FP SWM TRCP	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. <i>Note: Any publication which receives a PIO number. Transfer 3 copies to the Archives Collection in the City Secretary's Office as soon as published (permanent retention)</i>	GR 1000-39 US, expired, or discontinued

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CBU FC FP SWM TRCP	Reports and Planning Studies - if requested by City Council or submitted to state agency	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. <i>Note: For reports ordered by City Manager, use 1000-26A (5 years)</i> <i>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.</i>	GR 1000-41A1 Permanent
CBU FC FP SWM TRCP	Reports and Studies (non-Fiscal) - compiled on less than annual bases	Reports and flood 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
CBU FC FP SWM TRCP	Work papers used to create Reports and Planning Studies - if requested by City Council or submitted to state agency or until not valid	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
CBU FC FP SWM TRCP	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

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CBU FC FP SWM TRCP	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 weekly assignment sheets.	GR 1000-41B 1 year Exempt
CBU FC FP SWM TRCP	Waivers of Liability	Includes statements signed by volunteers acknowledging non-entitlement to benefits, agreeing to abide by local government policies, etc.) Note: If an accident occurs to any person covered by a signed waiver of liability, it must be retained for the same period as accident reports. Use retention number GR 1000-20A or B	GR 1000-42 3 years from date of cessation of activity for which the waiver was signed
CBU FC FP SWM TRCP	Calendars	Calendars used to document appointments or activities of government officials and employees. Outlook calendar entries can be deleted when eligible.	GR 1000-45 CE + 1 year Exempt
CBU FC FP SWM TRCP	Customer Service Survey	Customer Service Survey Cards	GR 1000-47 3 years
CBU FC FP SWM TRCP	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. 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

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CBU FC FP SWM TRCP	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 1025-04F 3 Years
CBU FC FP SWM TRCP	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
CBU FC FP SWM TRCP	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
CBU FC FP SWM TRCP	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.	GR 1025-08 FE + 5 years

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CBU FC FP SWM TRCP	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. <i>CCO will retain bond funded payables for FE of date of last bond payment + 3 years.</i>	GR 1025-26 FE + 3 years
CBU FC FP SWM TRCP	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
CBU FC FP SWM TRCP	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
CBU FC FP SWM TRCP	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. These monies may be capital or grant related.	GR 1025-27B FE + 5 years

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CBU FC FP SWM TRCP	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
CBU FC FP SWM TRCP	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. A copy would be sent to HR for file for formal disciplinary actions..	GR 1050-07C 2 years after case closed or action taken
CBU FC FP SWM TRCP	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
CBU FC FP SWM TRCP	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 + 2 years
CBU FC FP SWM TRCP	Employee Selection Records Files - Department Personnel File Copy	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

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CBU FC FP SWM TRCP	Personnel Files - Department Personnel File Copy	Records about an employee. Applications, resume, awards, commendations, certifications, licenses, conflict of interest forms, P-2 forms, training records including training on hazardous materials employee acknowledgment form, counsel program records, direct deposit, leave records, payroll records, etc.	GR 1050-12D Date of Separation + 5 years
CBU FC FP SWM TRCP	Grievance Records - Department Personnel File Copy	Records relating to the review of employee grievances against personnel policies, working conditions, etc. A copy would go to HR.	GR 1050-20 Final decision + 2 years
CBU FC FP SWM TRCP	Job Evaluations - Department Personnel File Copy	Job evaluations of employees. <u>Note:</u> File by date of review, not in individual employee files.	GR 1050-21B US + 2 years; or date of separation + 2 years whichever is sooner
CBU FC FP SWM TRCP	Medical and Exposure Records - Department Personnel File Copy	Health or physical examination reports or certificates for all applicants and employees if required for position. Includes random drug or alcohol tests. A copy would be sent to ORM for employee's file.	GR 1050-22A 2 years
CBU FC FP SWM TRCP	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. Workers Comp is not covered by HIPPA. <i>Note: Risk Management copy retained CE of closure of claim + 50 years. Department needs to maintain a copy of these records.</i>	GR 1050-32A CE of closure of claim + 5 years

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CBU FC FP SWM TRCP	Work Schedules	Work, duty, shift, crew, or case schedule, rosters, or assignments.	GR 1050-31 1 year Exempt
CBU FC FP SWM TRCP	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. Departments have to maintain a copy for records. <i>Note: Risk Management copy retained CE of closure of claim + 50 years.</i>	GR 1050-32A CE of closure of claim + 5 years
CBU FC FP SWM TRCP	Volunteer Service Files	Information about individual volunteers and duties they perform.	GR1050-39 US or date of separation + 3 years
CBU FC FP SWM TRCP	Bid and Bid Documentation - Successful Bids - Departmental copies	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 or for construction contracts use 1075-16A, 1075-16A1, 1075-16A2, or 1075-16B</i>	GR 1075-01A FE + 3 years
CBU FC FP SWM TRCP	Bid and Bid Documentation - Unsuccessful Bids - Departmental copies	Unsuccessful Bids-Department needs to maintain a copy in case of lawsuits.	GR 1075-01B 2 years

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CBU FC FP SWM TRCP	Inventory Records	Inventory parts records for parts and supplies	GR 1075-02 1 year Exempt
CBU FC FP SWM TRCP	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. <i>If tied to federal grant reimbursement use 1025-08.</i>	GR 1075-03A FE + 3 years
CBU FC FP SWM TRCP	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
CBU FC FP SWM TRCP	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 LA + 10 years <i>Note: Send an official record copy of the contract to the City Secretary's Office</i>

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CBU FC FP SWM TRCP	Construction Project Files - Underground Water Lines	If the construction of a structure described in GR1075-16A includes infrastructure (i.e. electrical lines, underground water lines, stormwater drains etc.)	GR 1075-16A1 Permanent <i>Note: Send an official record copy of the contract to the City Secretary's Office</i>
CBU FC FP SWM TRCP	Construction Project Files – Historical Buildings or Places	Records of the types described in 1075-16A relating to places eligible for or already listed as historic by national, state, or local organizations or authorities.	GR 1075-16A2 Permanent <i>Note: Send an official record copy of the contract to the City Secretary's Office</i>
CBU FC FP SWM TRCP	Construction Project Files - Facilities with short life cycle	Files related to the construction of prefabricated storage sheds, bus shelters, parking lot kiosks, non-structural recreational facilities such as baseball diamonds and tennis courts, irrigation systems and similar structures and facilities with a short life cycle. Note: Review before disposal; some records may merit PERMANENT retention for historical reasons.	GR 1075-16B 10 years after completion of the projects <i>Note: Send an official record copy of the contract to the City Secretary's Office</i>
CBU FC FP SWM TRCP	Construction Project Records - transitory or of ephemeral relevance	Records relating to construction projects described in (a) and (b), that are transitory or of ephemeral relevance, and are not required for maintaining, modifying, and repurposing the building or structure, Records may include, but are not limited to, rejected design plans, delivery tickets for expendable products, daily work reports, etc	GR 1075-16C 5 years

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CBU FC FP SWM TRCP	Lost and Stolen Property reports	Lost and Stolen Property reports	GR 1075-17 FE + 3 years
CBU FC FP SWM TRCP	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. Departments retain records of equipment (office machines, phones, etc).	GR 1075-18A1 1 year Exempt
CBU FC FP SWM TRCP	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. 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 Life of Asset
CBU FC FP SWM TRCP	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 3 years
CBU FC FP SWM TRCP	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

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CBU FC FP SWM TRCP	Warranties	Warranty for vehicles and equipment.	GR 1075-23 Expiration of warranty + 1 year
CBU FC FP SWM TRCP	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> <i>Note: If a part of a project/case, file with appropriate project file and follow retention using GR 1075-16A or B</i>	GR1075-40b 1 year
CBU FC FP SWM TRCP	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
CBU FC FP SWM TRCP	Operational Permits and Approvals - Water or Wastewater and Variance or exemption granted	Permits and approvals from the TCEQ, TNRCC, the EPA, and other county, state, and federal agencies as required by law or regulation concerning wastewater treatment and disposal, water use, water districts, environmental protection; and any reports, correspondence, or other documentation bearing directly on the application for, the issuance of, or the renewal of the permit or approval. Records concerning any variance or exemption granted to a system.	UT 5025-06A Expiration, cancellation, revocation, or denial + 5 years

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CBU FC FP SWM TRCP SWM	Operations Records - Monitoring Records and Reports less than an annual basis including reports to regulatory authorities	Records of monitoring activities, including records concerning measurements and analyses performed and concerning calibration and maintenance of flow measurement and other instrumentation. Periodic logs or reports compiled on less than an annual basis. Internal records, reports, logs, or similar records that document or summarize the operations of water supply, treatment, and distribution facilities, stations, and systems; and wastewater collection and treatment facilities, plants, and systems. Periodic monitoring, financial, and operational reports submitted to the TNRCC, the EPA, or other agencies and local governments as required by law or regulation on the collection, treatment, and disposal of wastewater and for monitoring the quality of any water in the state. SWM maintains these records.	UT 5025-07A 3 years
CBU FC FP SWM TRCP	Operations Records - Annual or biennial reports including reports to regulatory authorities	Annual or biennial reports that document or summarize the operations of water supply, treatment, and distribution facilities, stations, and systems; and wastewater collection and treatment facilities, plants, and systems. Annual and biennial reports or special reports ordered or required by a regulatory authority and submitted to the TNRCC, the EPA, or other agencies and local governments as required by law or regulation on the collection, treatment, and disposal of wastewater and for monitoring the quality of any water in the state.	UT 5025-07C Permanent

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**Trinity Watershed Management Department
Records Retention Schedule**

Division	Record Title	Record Description & Comments	State Record Number & Retention Period
CBU FC FP SWM TRCP	Special planning studies or reports ordered by City Council	Floodplain studies or reports prepared by order or request of the City Council or considered by the City Council (as reflected in its minutes) or ordered or requested by a state or federal agency or a court including feasibility studies, reports, analyses, projections, graphic material, and similar planning documents by outside consultants or in-house staff relating to comprehensive planning, capital improvements, land use and open space, economic development and outlook, neighborhood and housing renewal and renovation, regional and intergovernmental cooperation, transportation, traffic engineering, transit systems, airport operations, growth patterns, demographics, long range forecasts and projections, and other aspects of local government planning not listed elsewhere in this schedule.	PW 5200-01A Permanent
CBU FC FP SWM TRCP	Meteorological Records	ALERT rainfall and stream data.	PW 5200-01B1 Permanent
CBU FC FP SWM TRCP	Inspection Reports - Construction	Reports of inspections carried out with reference to new construction; alterations to existing structures; code violations; and other projects, activities, or situations requiring inspection by local ordinance, <i>excluding</i> those reports that are made part of any other record group noted elsewhere in this part.	PW 5250-08 3 years
CBU FC FP SWM TRCP	Maps and Plats	Maps, plats, engineering and field notes, and profiles and cross-sections of roads, streets, rights of way, bridges, etc.	PW 5275-02 Permanent

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**Trinity Watershed Management Department
Records Retention Schedule**

Division	Record Title	Record Description & Comments	State Record Number & Retention Period
CBU FC FP SWM TRCP	Special Event 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
CBU FC FP SWM TRCP	Allocations of Funds, Requests and Claims	Copies of requests and claims for allocation submitted to the Texas State Soil and Water Conservation Board	PW 5400-01 FE + 3 years
CBU FC FP SWM TRCP	Water Quality Management Plans	Water quality management and implementation plans developed by soil and water conservation plans for landowners to prevent and abate pollution, including any associated corrective action plans, notifications of withdrawal of certification, and maintenance agreements.	PW 5400-03 Life of plan + 2 years
CBU FC FP SWM TRCP	Environmental Protection and Natural Resources Management Plans and Environmental Quality Review Records	Planning reports, background materials, and supporting documentation used to provide for the protection of the environment. Environmental impact statements and related reports including background materials and supporting documentation used in preparing statements and reports.	PW 5450-02 Permanent
CBU FC FP SWM TRCP	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 Exempt

Prepared by: Donna Dones
Donna Dones

6-3-16
Date

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**Trinity Watershed Management Department
Records Retention Schedule**

Records Liaison Officer
Trinity Watershed Management

Reviewed by: Lois Dillard
Lois A. Dillard, CRM
Records Management Officer
City Secretary's Office

8-3-16
Date

Approved by: Sarah Standifer
Sarah Standifer
Director
Trinity Watershed Management

8/1/16
Date

Revised April 18, 2016 to add record series that have been transferred to TWM, and to reflect changes in Texas State Library schedules with revised descriptions, retention numbers, retention periods and new record series.

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