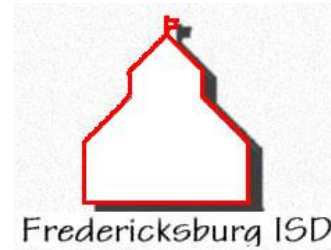


FISD Records Retention



Requirements

Record retention ensures that critical records are identified and retained in accordance with State and Federal guidelines.

Destruction of local government records contrary to the provisions of the Local Government Records Act of 1989 and administrative rules adopted under it, including this schedule, is a Class A misdemeanor and, under certain circumstances, a third degree felony (Penal Code, Section 37.10). Anyone destroying local government records without legal authorization may also be subject to criminal penalties and fines under the Public Information Act (Government Code, Chapter 552).

The Local Government Records Act establishes the primary requirements for records retention policies and plans. These record retention guidelines are specified in the retention schedules and approved by the State Library and Archives Commission. The schedules that pertain to school districts include:

Local Schedule SD - Records for Public School Districts

Local Schedule GR - Records Common to All Governments

Local Schedule EL - Records of Elections and Voter Registration

Local Schedule TX - Records of Property Taxation

In addition, the Local Government Records Act requires the District to elect a Records Management Officer to coordinate the District's records management activities. FISD's records management officer is the Assistant Superintendent for Business and Finance.

Below is a brief listing of some of the more common records retention. Years or AV (administratively valuable) is noted for each item. Information concerning any records not addressed here can be found in the Legal Reference Book. Copies of the current State Library and Archives schedules can be requested from the Records Management Officer or found on line at: <http://www.tsl.state.tx.us/slr/recordspubs/sd.html> or <http://www.tsl.state.tx.us/slr/recordspubs/gr.html>.

Should you find that we need to add to the information below, please contact us to do so.

Local Schedule SD-Records for Public School Districts

1099 Forms	7 Years
Accident Reports – Personal Injury	5 Years
Accident Reports – Property Damage	3 Years
Accident Reports	5 Years
Adult & Vocational Ed Records	7 Years
Application (Foundation Funds)	5 Years after completion
Athletic Game/Cash Reports	7 Years
Audit Reports	Permanent
Audit Work papers	7 years after completion
Bank Statements & Canceled Checks	7 Years
Bids (successful) & RFPs	7 Years
Bids (unsuccessful)	2 Years
Blood Borne Pathogen Training Records	3 Years
Board Minutes of Meetings	Permanent

Board Resolutions & Dedications	Permanent
Board (most other items)	2 Years
Bonds: Administrative Records & Registers	Permanent
Bonds: Cancelled & Coupons	1 Year after payment
Bonds: Fidelity Bonds Life of Bond	5 Years
Budget Work Papers	3 Years
Budgets and amendments (Official)	Permanent
Capital Assets	Life of asset + 5 Years
Cash Receipt Books	5 Years
Census Records	Permanent
Certificates, Licenses, or Permits	5 Years after Employee Separation
Check Register	10 Years
Construction Project Files	Permanent
Contracts, Architects & Engineers	5 Years after Project Completion
Contracts, Construction	7 Years after Final Payment
Contracts, Facilities Use	4 Years after Expiration
Contracts, Installation	10 Years after Project Completion
Contracts, Maintenance & Service	4 Years after Expiration
Contracts, Other	4 Years after Project Completion
Criminal History Checks	1 year from date obtained
Deeds	Permanent
Deposit Slips, Deposit Documents & Records	7 Years
E-mail:	If important, print out and keep as required
	Policy & Program Development
	Administrative
	Routine
EEOC Records, Reports, and Case Files	3 Years
Easements	Permanent
Election Results and Minutes	Permanent
Election Materials	2 Years
Employee Absence from Duty Reports	4 Years
Employee Drivers Records	3 Years
Employee Ethnicity and Race Data Collection Records	3 Years
Employee Exit Interviews	2 Years
Employee Fingerprint Records	5 Years after Separation
Employee Grievance Records	2 Years
Employee Insurance Records	11 Years after Separation
Employee IRS Forms W-2, W-4, 1094, and 1095	4 Years after Separation
Employee Job Evaluations	2 Years
Employee Leave Status Cards	3 Years
Employees' Permanent Files	10 Years after Separation
Employee/Personnel Roster	3 Years
Employee/Personnel Studies & Surveys	3 Years
Employee Selection Records	2 Years
Employee Service Records	Permanent
Employee Teacher Performance Appraisal Records	Permanent
Employee Teacher Performance Appraisal Growth Plans	4 Years
Employee Teacher Certificate Registers	Permanent
Employment Ads or Announcements	2 Years
Employment Applications	2 Years

Employment Contract	4 Years
Enrollment Forms and Reports	5 Years after withdrawal
E-Rate records	10 Years
Equipment Maintenance Records	Perm (until Equip Is Disposed)
Facilities Maintenance & Repair Records	3 Years
Financial Reports-Periodic	4 Years
Financial Disclosure Statements	2 Years
Fire Drill Records	3 Years
Fire Safety Inspection Reports	3 Years
Fixed Asset Records	7 Years
General Journal Entries	7 Years
General Ledger	7 Years
Grade Book (electronic and official)	5 Years
Grade reports (teachers)	AV
Grade report cards	1 year after entry in AAR
Grant Applications	7 Years
Hazardous Communication Act Material	Permanent
Hazardous Material Training Records	5 Years
Health Inspection Reports	3 Years
Health Reports Submitted to TX Dept of Health	3 Years
Health Reports of Employees exposed to toxic agents	30 Years after Separation
Insurance Policies	4 Years after Expiration
Internal Audit Work Papers	5 Years
Inventory Reports	7 Years
Investment/Cash Pledged Securities Records	7 Years
Investment Records/Reports	7 Years
Journals, All	7 Years
Library Records	AV
Legal Opinions	Permanent
Lesson Plans	AV
Lost & Stolen Property Reports	3 Years
Maintenance Work Orders	2 Years
Material Safety Data Sheets	Until Superseded or Obsolete
Open Record Requests	One year after final decision
Paid Bills, Invoices & Exp Statement	7 Years
Payroll Checks	5 Years
Payroll Deduction Authorizations	4 Years after Separation
Payroll Registers	7 Years
Payroll Tax Reports	4 Years
Payroll Time Reports	4 Years
PEIMS reports	5 Years
Permits and Licenses	2 Years after expiration
Policies & Administrative Regulations	Permanent or until Superseded
Principals' and Superintendents' Reports	10 Yrs-Period, 20 Yrs-Term
Procedure Documentation	Until changed plus 5 years
Professional Growth Plans	4 Years
Purchase Orders (Payment Copy)	7 Years
Purchase Orders & Requisitions	7 Years
Records Management Records Control Schedule	Permanent
Reports (annual) to State Agencies	Permanent

Returned Checks	7 Years
Safety Monitoring Reports concerning toxic sub	30 Years
Sales Tax Reports	4 Years
School Board Agenda	2 Years
School Board Meetings Minutes	Permanent
School Bus Purchase Requisitions	5 Years
School Calendar	2 Years
School Nutrition Records	5 Years
Schools FIRST reports and support	3 Years
Special Education enrolment lists	7 years
Special Education student records	cessation + 7 years
Student Academic Achievement record 9-12	Permanent
Student Accident reports	5 Years or 18+ 2 years
Student Accounting Cards	5 Years
Student Activity Accounting Records	5 Years
Student Attendance records (teacher)	AV
Student Attendance regarding home visits	2 Years
Student Attendance Records/Reports (official electronic)	Date of withdrawal + 5 Years
Student birth certificate	AV
Student Cumulative Records K-8 withdrawal	5 years
Student Cumulative Records 9-12 withdrawal	Permanent
Student Custody records	Until student is 18 years old
Student Directory Information forms	Current student - until superseded
Student Discipline – no expulsion	AV
Student Disciplinary & Adverse Action Records- for removal of student to DAEP or expulsion	5 Years
Student Drug/Alcohol test results	1 Year
Student Drug/Alcohol positive tests	Withdrawal or Graduation
Student Emergency Cards	Superseded or withdrawn
Student Enrollment/registration forms	Withdrawal + 5 years
Student Exclusion from participation documents	Withdrawal + 2 years
Student Extracurricular Activity Records	2 Years
Student Guidance and counseling	AV (unless special programs)
Student Handbook Acknowledgement Form	Current student - until superseded
Student Health Communications with parents	2 Years
Student Health Screening/Records	Withdrawal + 2 Years
Student Home Language Surveys	Date of withdrawal + 5 Years
Student Immunization Records	2 Years after date of withdrawal
Student Impact Aid Survey forms	7 years if eligible, otherwise AV
Student medication/treatments	3 years
Student permission slips for field trips	Activity + 2 years
Student physician authorizations and parent request	Activity + 2 Years
Student reports to law enforcement agencies	2 years
Student Special Program Records	cessation + 5 Years
Student Test and Academic Measurement Reports	Withdrawal + 5 Years
Student Transfer information	5 Years
Student Withdrawal/Record Transfer Form	AV
Substitute Teaching Rosters	3 Years
Tax Correspondence	2 Years
Tax Rate Calculation Worksheets & Notices	5 Years

Tax Refund Applications	3 Years
Tax Rolls and amendments	Permanent
Tax Statement	Until FYE Audit is completed
Telephone Logs and Activity Records	2 Years
Textbook Records	2 Years
Transfer Records	7 Years
Transportation Reports to TEA	5 Years
UIL Records	2 Years
Unemployment Compensation Claim File	5 Years
Visitor Logs	3 Years
Warehouse Reports/Transactions	3 Years
Work Place Chemical List	30 Years
Workers' Compensation Claim Files	5 Years