

Spring Independent School District
Payroll Records -Disposition Log

School Dude Work Order#:	Date:	School/Dept:
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Name:	Digital Signature:
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I certify that these district records are in compliance with the mandatory minimum retention periods specified by the Texas State Library and Archives Commission Local Schedules (SD, GR , TX, PS, EL, and UT) and that all holds and administrative requirements have been satisfied.

A District record may not be destroyed if any litigation, claim, negotiation, audit, open records request, administrative review, or other action involving the record is initiated before the expiration of the retention period. The record must be retained until completion of the action and the resolution of all issues that arise from it.

*** PLEASE ASK FOR CLARIFICATION IF A RECORD DOES NOT FALL UNDER A RECORD TITLE OR DESCRIPTION, IT DOES NOT NECESSARILY MEAN IT CAN BE DISPOSED OF***

Texas State Library & Archive Commission (TSLAC)					No. of Boxes	Box # on Label	Specific Content (attach addtl doc to work order if necessary)	School Yr of Records	Disp Meth
Record #	Record Title	Record Description	Retention Period	Remarks					
GR1050-50	DEDUCTION AUTHORIZATIONS	Documentation used to start, modify, or stop all voluntary or required deductions from payroll, including orders of garnishment or other court-ordered attachments.	4 years after separation or 4 years after amendment, expiration, or termination of authorization, whichever sooner.						
GR1050-51	DIRECT DEPOSIT APPLICATIONS/ AUTHORIZATIONS		US or date of separation, as applicable.						
GR1050-52	EARNINGS AND DEDUCTION RECORDS								
GR1050-52a	A record containing the following payroll information on each employee: name, last known address and social security number, amount of wages paid to the employee for each payroll period, including all deductions, and date of payment.	Retention of any one of the following records for 5 years by school districts or 4 years by other local governments will satisfy the retention requirement:	By regulation - 20 CFR 404.1225(b) (3) and 40 TAC 815.106(i).						

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GR1050-52b	EARNINGS AND DEDUCTION RECORDS	A record containing the following minimum pension and deferred compensation information on each employee: name, date of birth, social security number, and amount of pension and deferred compensation deductions.	The retention of any one of the following for date of separation + 75 years will satisfy the retention requirement: 1) Individual employee earnings card or record as in (a)(1). 2) Employee Service Record (see item number GR1050-12) if it contains the prescribed pension and deferred compensation deduction data. 3) Master payroll register, or the final year-to-date register of each calendar year, if the register shows all persons employed during the year from whose wages, pension, and deferred compensation deductions were made.						

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	EARNINGS AND DEDUCTION (continued) RECORDS		4) Pension and deferred compensation deduction register, or the final year-to-date pension deduction register of each calendar year, if the register lists all persons employed during the year from whose wages pension and deferred compensation deductions were made. 5) Copies of annual or other periodic statements furnished to each employee detailing the deductions and contributions to a pension or deferred compensation plan during the past year or period.						

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GR1050-52c	EARNINGS AND DEDUCTION RECORDS	Master payroll register, including year-todate registers, if not used to satisfy either of the retention requirements set in (a) or (b).	FE + 5 years for school districts; FE + 3 years for other governments.						
GR1050-52d	EARNINGS AND DEDUCTION RECORDS	Subsidiary payroll registers, if not (1) If data contained in the subsidiary payroll register is not contained in the master payroll register. (2) If data contained in the subsidiary payroll register is contained in the master payroll register.	FE + 5 years for school districts; FE + 3 years for other governments. AV.						
GR1050-52e	EARNINGS AND DEDUCTION RECORDS	Copies of annual or other periodic statements furnished to each employee detailing the deductions and contributions to a pension or deferred compensation plan during the past year or period, if not used to satisfy the retention requirement set in (b).	2 years.						
GR1050-52f	EARNINGS AND DEDUCTION RECORDS	Payroll adjustment records, including transaction registers, authorizations, and similar records authorizing and detailing adjustments to payroll records because of overpayment, underpayment, etc.	FE + 5 years for school districts; FE + 3 years for other governments.						
GR1050-53	FEDERAL AND STATE TAX FORMS AND REPORTS								

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GR1050-53a	FEDERAL AND STATE TAX FORMS AND REPORTS	Forms used to determine withholding from wages and salaries for payroll tax purposes (W-4 Forms).	4 years after separation or 4 years after form amended, whichever sooner.	By regulation - 20 CFR 404.1225(b) (3), 26 CFR 31.6001-1(e) (2) for federal forms and by authority of this schedule for any					
GR1050-53b	FEDERAL AND STATE TAX FORMS AND REPORTS	Forms and reports used to report the collection, distribution, deposit, and transmittal of payroll or unemployment taxes (W-2, 1099).	4 years after tax due date or date tax paid, whichever later.	By regulation - 20 CFR 404.1225(b) (3), 26 CFR 31.6001-1(e) (2) for federal forms and by authority of this schedule for state forms.					
GR1050-54	LEAVE RECORDS								

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GR1050-54a	LEAVE RECORDS	A record containing a record of the unused accumulated sick leave of each employee if (1) all or a percentage of accumulated sick leave is used to calculate length of service and/or (2) accumulated sick leave is creditable to an employee if rehired.	The retention of any one of the following for date of separation + 75 years will satisfy the retention requirement: 1) Individual employee earnings card or record as described in item number GR1050-52a if it also contains accumulated sick leave data. 2) Employee Service Record (see item number GR1050-12) if it contains the accumulated sick leave data prescribed. 3) Copy of the final time summary or leave status report, as noted in (d), of each separated employee.						
GR1050-54b	LEAVE RECORDS	Requests and authorizations for vacation, compensatory, sick, Family and Medical Leave Act (FMLA), and other types of authorized leave, and supporting documentation.	FE + 5 years for school districts; FE + 3 years for other governments.	By regulation – 29 CFR 825.500.					
GR1050-54c	LEAVE RECORDS	Leave or hours-to-date registers.	FE + 5 years for school districts; FE + 3 years for other governments.						

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GR1050-54d	LEAVE RECORDS	Copies of periodic time summary or leave status reports furnished to each employee containing information on vacation, sick, compensatory, or other leave earned and used, including the final report of separated employees if they are not used to satisfy the retention requirement set in (a).	2 years.						
GR1050-55	PAYROLL ACTION OR INFORMATION NOTICES	Documents used by payroll officers to create or change information in the payroll records of individual employees except deduction authorizations (see item number GR1050-50) and federal tax forms [see item number GR1050-53(a)].							
GR1050-55a	PAYROLL ACTION OR INFORMATION NOTICES	Documents concerning hiring, termination, transfer, pay grade, position or job title, name changes, etc.	2 years from the date of creation or personnel action involved, whichever is later.	By regulation - 29 CFR 1602.31, 1602.40, and 1602.49. Retention Note: Refer to GR1050-12 in this schedule as some information must be kept in					
GR1050-55b	PAYROLL ACTION OR INFORMATION NOTICES	Documents concerning adjustments to payroll or leave status.	FE + 3 years.	Retention Note: Refer to GR1050-12 in this schedule as some information must be kept in Employee					

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GR1050-56	TIME AND ATTENDANCE REPORTS	Time cards or sheets, including work schedules and documentation evidencing adherence to or deviation from normal hours for those employees working on fixed schedules.	4 years.	By regulation - 40 TAC 815.106(i).					
GR1050-57	TIME CHANGE RECORDS	Requests and authorizations for overtime, time trading, and other actions that affect normal work time except leave requests [see item number GR1050-54(c)].	2 years.						
GR1050-58	REIMBURSABLE ACTIVITIES, REQUESTS AND AUTHORIZATIONS TO ENGAGE IN	Requests and authorizations for travel; participation in educational programs, workshops, or college classes; or for other bona fide work-related activities in which the expenses of an employee are defrayed or reimbursed.	FE + 5 years for school districts; FE + 3 years for other governments.						
GR1050-59	WAGE AND SALARY RATE TABLES								
GR1050-59a	WAGE AND SALARY RATE TABLES	If wage or salary rate for each position listed on an Employee Service Record (see item number GR1050-12) is expressed in dollars.	2 years after last effective date.	By regulation - 29 CFR 516.6(a)(2).					
GR1050-59b	WAGE AND SALARY RATE TABLES	If wage or salary rate for each position listed on an Employee Service Record (see item number GR1050-12) is indicated by grade or step number only.	Date of separation + 75 years.						

Total No. of

Retention Codes	
AV	As long as Administratively Valuable
CE	Calendar Year End
FE	Fiscal Year End
LA	Life of Asset
US	Until Superseded

Archival Codes	
A	Approval Required before Destruction
D	Destroy at Retention Period End
LF	Import into LaserFiche

Office Use Only	
Records Management Digital Signature:	
RMO Digital Signature:	