

Spring Independent School District
Personnel Records -Disposition Log

School Dude Work Order#:	Date:	School/Dept:
Name:	Digital Signature:	

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)					Record Disposition Log			
Record #	Record Title	Record Description	Retention Period	Remarks	No. of Boxes	Specific Content (attach addtnl doc to work order if necessary)	School Yr of Records	Disp Meth
GR1050-01	AFFIRMATIVE ACTION PLANS							
GR1050-01a	AFFIRMATIVE ACTION PLANS	Reports, analyses, and statistical data compiled from source documentation used to develop, implement, and monitor affirmative action plans.	5 years.	By regulation - 29 CFR 30.8(e).				
GR1050-01b	AFFIRMATIVE ACTION PLANS	Affirmative action plans.	US + 5 years.	By regulation - 29 CFR 30.8(e).				
GR1050-02	APTITUDE AND SKILLS TEST RECORDS	Records relating to aptitude or skills tests required of job applicants or of current personnel to qualify for promotion or transfer, including civil service examinations.						
GR1050-02a	APTITUDE AND SKILLS TEST RECORDS	Validation studies.	Life of test + 2 years.					

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GR1050-02b	APTITUDE AND SKILLS TEST RECORDS	Tests.	US + 2 years.	By regulation - 29 CFR 1602.31, 1602.40, and 1602.49. Retention Note: One copy of each different test (different in terms of either questions or administration procedures) should be retained for the period indicated.				
*GR1050-02c	APTITUDE AND SKILLS TEST RECORDS	Test papers or results of persons taking tests.	Date of creation or personnel action involved, whichever later, + 2 years.	By regulation - 29 CFR 1602.31, 1602.40, and 1602.49.				
GR1050-02d	APTITUDE AND SKILLS TEST RECORDS	Records, other than those noted (a)-(c), relating to the planning and administration of tests.	3 years.					
*GR1050-03	AWARDS AND COMMENDATIONS	Individual award, honor, or commendation bestowed on an employee.	Date of separation + 5 years.	Retention Notes: a) For administrative records of awarding committees, see item number GR1050-09.				
				b) Refer to Retention Note (f) on page 1 of this schedule for awards bestowed on certain Sheriff's office employees.				

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GR1050-04	CERTIFICATES AND LICENSES	Certificates, licenses, or permits required of employees to qualify for or remain eligible to hold a position requiring certification or licensing.	US or separation of employee + 5 years.	Retention Note: If the submission of copies of certificates, licenses, or permits is required of all applicants for a position, those of applicants not hired must be retained for 2 years under item number GR1050-14.				
GR1050-05	CONFLICT OF INTEREST AFFIDAVITS		5 years after leaving position for which the affidavit was filed.					
GR1050-06	COUNSELING PROGRAM RECORDS							
*GR1050-06a	COUNSELING PROGRAM RECORDS	Reports of interviews, analyses, and similar records relating to the counseling of an employee for work-related, personal, or substance abuse problems, including any warnings associated with the counseling. Usually maintained at the supervisory level or by human resources departments.	3 years after termination of counseling.	Retention Note: For records retained by professional therapists; refer to Local Schedule HR for patient records.				
GR1050-06b	COUNSELING PROGRAM RECORDS	Records relating to the planning, coordination, implementation, direction, and evaluation of an employee counseling program.	3 years.					

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*GR1050-07	DISCIPLINARY AND ADVERSE ACTION RECORDS	Records created by civil service boards or 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.		Retention Note: Refer to Retention Note (f) on page 1 of this schedule for disciplinary records of certain Sheriff's office employees.				
		(1) All employees of sheriff's departments in counties with a population of 3.3 million or more.	PERMANENT.	By law – Local Government Code, Section 157.904.				
		(2) Police and fire department personnel in municipalities with a population of 10,000 or more that have established civil service boards under Local Government Code, Chapter 143.	PERMANENT.	By law – Local Government Code, Section 143.011(c).				
		(3) All other local government employees.	2 years after case closed or action taken, as applicable.	By regulation - 29 CFR 1602.31, 1602.40, and 1602.49.				

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GR1050-08	EMPLOYEE PENSION AND BENEFITS RECORDS			For records of pension and deferred compensation deductions from payroll see GR1050-52(b).				
GR1050-08a	EMPLOYEE PENSION AND BENEFITS RECORDS	Employee benefit plans such as pension; life, health, and disability insurance;seniority and merit systems; and deferred compensation plans, including amendments.	Termination of plan + 1 year.	By regulation - 29 CFR 1627.3(b)(2). Retention Note: If the plan or system is not in writing, a memorandum fully outlining the terms of the plan or system and the manner in which it has been communicated to affected employees, together with notations relating to any revisions, must be retained for the same period as written plans.				
*GR1050-08b	EMPLOYEE PENSION AND BENEFITS RECORDS	Enrollment forms providing personal identifying data, beneficiary information, option selection, acknowledgement forms, and similar information.						
		(1) If the official record is maintained by the retirement system of which the local government is a member or by the service provider.	AV.					

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		(2) If the official record is maintained by the local government.	Date of separation + 75 years.					
		(A) Pension and deferred compensation.	Termination of coverage + 4 years.					
		(C) Any benefit other than those noted in (A) or (B).	US or separation + 2 years, as applicable.	Retention Note: Documents that serve as payroll deduction authorizations must be maintained for the retention period prescribed for item number GR1050-50.				
GR1050-08c	EMPLOYEE PENSION AND BENEFITS RECORDS	Annual reports from a pension system or fund.	PERMANENT.					
*GR1050-09	EMPLOYEE RECOGNITION	Award committee reports, selection criteria, nominations, and similar administrative records of employee award or incentive programs.	2 years.	Retention Note: For records of an award/commendation given to an individual employee, see item number GR1050-03.				
GR1050-10	EMPLOYEE SECURITY RECORDS							
GR1050-10a	EMPLOYEE SECURITY RECORDS	Records created to control and monitor the issuance of keys, identification cards, passes, or similar instruments of identification and access.	US, date of expiration, or date of separation + 2 years, as applicable.					

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GR1050-10b	EMPLOYEE SECURITY RECORDS	Records relating to the issuance of parking permits.	US.					
GR1050-11	EMPLOYEE SELECTION RECORDS	Notes of interviews with candidates; audio and videotapes of job interviews; applicant rosters; eligibility lists; test ranking sheets; justification statements for violating eligibility or ranking sequence; and previous injury checks; offers of employment letters; and similar records documenting the filling of a vacant position.	2 years from the creation (or receipt) of the record or the personnel action involved, whichever later.	By regulation - 29 CFR 1602.31, 1602.40, and 1602.49. Retention Note: See GR1050-36 for background and criminal history checks.				

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GR1050-12	EMPLOYEE SERVICE RECORDS	Summary employment history record for each employee maintained on one or more forms, containing the following minimum information: name; sex; date of birth; social security number; positions held with dates of hire, promotion, transfer, or demotion; dates of leaves of absence or suspension that affect computation of length of service; wage or salary rate for each position held, including step or merit increases within grades; most recent public access option form; and date of separation.	Date of separation + 75 years.	For other information on employees that must also be retained either as part of this record or in another form, see item numbers GR1050-52(b) and GR1050-54(a). Retention Notes: a) This schedule does not require the creation of an employee service record of the type described, but the creation of the record is strongly recommended to allow frequent disposal of documents from which information has been summarized. If an employee service record is not maintained, documents (e.g., employment applications, personnel action forms) containing the prescribed information must be retained date of separation + 75 years. More than one document providing the same element of required information need not be retained. b) The Teacher Service				

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				<p>information must be retained date of separation + 75 years. More than one document providing the same element of required information need not be retained.</p> <p>b) The Teacher Service Record (Texas Education Agency Form FIN-115 or its equivalent), containing information required by statute or regulation, shall be considered an employee service record of the type described and must be retained date of separation + 75 years.</p> <p>c) Salary or wage data on an employee service record may be indicated by grade and step numbers if all corresponding wage rate tables (see item number GR1050-59) applicable to a person's employment history are retained date of separation + 75 years.</p>				

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GR1050-13	EMPLOYMENT ADVERTISEMENTS OR ANNOUNCEMENTS	Advertisements or postings relating to job openings, promotions, training programs, or overtime opportunities, including jobs orders submitted to employment agencies.	2 years.	By regulation - 29 CFR 1602.31, 1602.40, and 1602.49.				
*GR1050-14	EMPLOYMENT APPLICATIONS							
GR1050-14a	EMPLOYMENT APPLICATIONS	Applications, transcripts, letters of reference, and similar documents whose submission by candidates for vacant positions (both hired and not hired) or for promotion, transfer, or training opportunity (both selected and not selected) is required on the application form, by application procedures, or in the employment advertisement.	2 years from the creation (or receipt) of the record or the personnel action involved, whichever later.	By regulation - 29 CFR 1602.31, 1602.40, and 1602.49.				
GR1050-14b	EMPLOYMENT APPLICATIONS	Samples of publications, artwork, or other products of prior achievement not returned to applicants.	AV.					

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GR1050-14c	EMPLOYMENT APPLICATIONS	Transcripts of persons hired if state or federal law or regulation mandates a level of education needed to qualify for employment (e.g., school district professional and paraprofessional personnel). See also item number GR1050-28(a).	Date of separation + 5 years.	Retention Note: If applicant screening or hiring decisions are based on resumés, with only successful or interviewed candidates completing employment applications, then resumés of persons not hired must be kept for the same period as employment applications. If resumés are supplemental to employment application forms, they need only be retained as long as administratively valuable.				
GR1050-15	EMPLOYMENT CONTRACT/COLLECTIVE BARGAINING RECORDS							
GR1050-15a	EMPLOYMENT CONTRACT/COLLECTIVE BARGAINING RECORDS	Contracts and agreements, including collective bargaining agreements, between a local government and an employee or a group of employees, including written acceptances of such contracts.	Last effective date of contract + 4 years.					

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GR1050-15b	EMPLOYMENT CONTRACT/COLLECTIVE BARGAINING RECORDS	Records relating to the negotiation of collective bargaining agreements or similar group contracts, including reports; correspondence; mediation or arbitration agreements; the proceedings, findings, and awards of arbitration boards; and similar records.	Last effective date of contract + 4 years or, if no agreement or contract results, 4 years.					
GR1050-16	EQUAL EMPLOYMENT OPPORTUNITY RECORDS AND REPORTS							
GR1050-16a	EQUAL EMPLOYMENT OPPORTUNITY RECORDS AND REPORTS	Reports, analyses, or statistical data compiled from source documentation used to complete EEO reports.	3 years.	By regulation - 29 CFR 1602.30, 1602.39, and 1602.48.				
GR1050-16b	EQUAL EMPLOYMENT OPPORTUNITY RECORDS AND REPORTS	EEO-1, EEO-4, EEO-5, and EEO-6 reports.	3 years.	By regulation - 29 CFR 1602.32, 1602.41,				
GR1050-16c	EQUAL EMPLOYMENT OPPORTUNITY RECORDS AND REPORTS	Case files relating to discrimination complaints, including complaints, legal and investigative documents, exhibits, related correspondence, withdrawal notices, and decisions or judgments.	Resolution of case + 3 years.					

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GR1050-17	EQUAL PAY RECORDS	Reports, studies, aggregated or summarized data, and similar documentation compiled to monitor and demonstrate compliance with the Equal Pay Act.	2 years.	By regulation - 29 CFR 1620.32(c).				
GR1050-18	FIDELITY BONDS		Effective life of bond + 5 years.	Retention Note: Does not include the Official Bond Record maintained by county clerks, which must be retained PERMANENTLY.				
GR1050-19	FINGERPRINT CARDS		Date of separation + 5 years.	Retention Note: If fingerprint cards are created for all applicants for a position, those of persons not hired must be retained 2 years under item number GR1050-14.				
*GR1050-20	GRIEVANCE RECORDS	Records relating to the review of employee grievances against personnel policies, working conditions, etc.	Final decision on the grievance + 2 years.	Retention Note: Do not confuse these records with those involving EEO complaints [see item number GR1050- 16(c)].				

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*GR1050-21	JOB EVALUATIONS		US + 2 years or date of separation + 2 years, whichever sooner.	"By regulation – 29 CFR 1620.32(c). Retention Notes: a) Refer to SD3575-05" "pertaining to evaluations on school teachers." b) Refer to Retention Note (f) on page 1 of this schedule for evaluations of certain Sheriff's office employees.				
GR1050-22	MEDICAL AND EXPOSURE REPORTS							
*GR1050-22a	MEDICAL AND EXPOSURE REPORTS	Health, physical or psychological examination reports or certificates of all job applicants if physical or psychological condition is a factor in hiring decisions, including the promotion, transfer, or selection for training of current personnel.	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.				
GR1050-22b	MEDICAL AND EXPOSURE REPORTS	Health or physical examination reports or certificates of employees for whom periodic monitoring of health or fitness isrequired.						
		(1) For employees exposed in the course of their work to toxic substances, harmful physical agents, or bloodborne pathogens.	Date of separation + 30 years.	By regulation - 29 CFR 1910.1020(d)(1)(i)-(iii).				
		(2) For all other employees.	US + 2 years.					

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GR1050-22c	MEDICAL AND EXPOSURE REPORTS		30 years.	By regulation - 29 CFR 1910.1020(d)(1)(ii). See Local Schedule PW 5450-01 for Asbestos Management Records.				
*GR1050-22d	MEDICAL AND EXPOSURE REPORTS	Records of controlled substances and alcohol use and testing.		By regulation – 49 CFR 382.403.				
		(1) Records of driver alcohol test results indicating an alcohol concentration of 0.02 or greater; records of driver verified positive controlled substances test results; documentation of refusals to take required alcohol and/or controlled substances tests; driver evaluation and referrals; calibration documentation; records related to the administration of the alcohol and controlled substances calendar year summary required by 49 CFR 382.403.	5 years.					
		(2) Records related to the alcohol and controlled substances collection process.	2 years.					
		(3) Records of negative and canceled controlled substances test results and alcohol test results with a concentration	1 year."					

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*GR1050-23	OATHS OF OFFICE	Any oaths or affirmations required of local government employees or officers. Includes the Statement of Elected Officer (Secretary of State Form 2201).	US + 5 years or 5 years after leaving position for which oath required, whichever is applicable.					
*GR1050-24	PERSONNEL ACTION OR INFORMATION NOTICES	Documents used by personnel officers to create or change information in the personnel records of individual employees concerning hiring, termination, transfer, pay grade, position or job title, leaves of absence, name changes, and similar personnel actions except those noted elsewhere in this part	2 years from the date of creation or the personnel action involved, whichever is later.	By regulation - 29 CFR 1602.31, 1602.40, and 1602.49.				
GR1050-25	PERSONNEL STUDIES AND SURVEYS	Studies, statistical reports, surveys, cost analyses and projections, and similar records, except those noted elsewhere in this part, on any aspect of the personnel management or administration of a local government.	3 years.	Retention Note: Review before disposal;some documents may merit PERMANENT retention for historical reasons.				
GR1050-26	POSITION DESCRIPTION, CLASSIFICATION, AND STAFF MONITORING RECORDS							

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GR1050-26a	POSITION DESCRIPTION, CLASSIFICATION, AND STAFF MONITORING RECORDS	Job descriptions, including any associated task or skill statements. Also includes documentation concerning the development and analysis of job descriptions and classification systems, including survey, review and audit reports; classification standards and guidelines; selection criteria; determination of classification appeals; etc.	US or position abolished + 4 years.	By regulation - 40 TAC 815.106(i).				
GR1050-26b	POSITION DESCRIPTION, CLASSIFICATION, AND STAFF MONITORING RECORDS	Position staffing and vacancy reports.	US.					
GR1050-26c	POSITION DESCRIPTION, CLASSIFICATION, AND STAFF MONITORING RECORDS	Personnel requisitions.	2 years.					
*GR1050-27	REDUCTION IN FORCE PLANS	Reduction in force plans and any related documentation.	US, or if implemented, 2 years from date of last reduction in force action under the plan.					

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GR1050-28	TRAINING AND EDUCATIONAL ACHIEVEMENT RECORDS			For other records relating to aptitude or skills tests required of job applicants or of current personnel to qualify for promotion or transfer see item number GR1050-02.				
GR1050-28a	TRAINING AND EDUCATIONAL ACHIEVEMENT RECORDS	Certificates of completion, transcripts, test scores, or similar records documenting the training, testing, or continuing education achievements of an employee if such training or testing is required for the position held or if the educational or skill attainment or enhancement affects or could affect career advancement in the local government or, in the case of licensed or certified personnel (e.g., school professionals, firefighters, police officers, health care professionals), in other governments or the private sector.	Date of separation + 5 years.	Retention Note: If information concerning training or testing (e.g., test scores) is transferred to an Employee Service Record (item number GR1050-12), the document from which the information is taken need be retained for only 2 years.				
GR1050-28b	TRAINING AND EDUCATIONAL ACHIEVEMENT RECORDS	Records documenting the planning, development, implementation, administration and evaluation of in-house training programs.	2 years.					

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GR1050-28c	TRAINING AND EDUCATIONAL ACHIEVEMENT RECORDS	Training manuals, syllabuses, course outlines, and similar training aids used in in-house training programs.	US, expired, or discontinued + 2 years.					
GR1050-28d	TRAINING AND EDUCATIONAL ACHIEVEMENT RECORDS	Skill or achievement measurement records of a training group or class as a whole (e.g., rosters with scores).	2 years.	Retention Note: If the only information documenting the in-house training of an employee of the types described in (a) is contained in the measurement records of a group or class as a whole, the group records must be retained for the date of separation + 5 years for all employees included in the group records.				
GR1050-29	UNEMPLOYMENT COMPENSATION CLAIMS RECORDS	Unemployment claims, pertinent correspondence, and similar records documenting unemployment compensation cases.	After closed + 5 years.					
*GR1050-30	VERIFICATIONS OF EMPLOYMENT ELIGIBILITY (Form I-9)		3 years from hire or 1 year after separation, whichever later.	By regulation - 8 CFR 274a.2(b)(2)(i)(A) and (c)(2) Retention Note: If a former employee is rehired and a Form I-9 is still on file for the employee, the 3-year retention period dates from date of first hire.				

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GR1050-31	WORK SCHEDULES	Work, duty, shift, crew, case schedules, rosters, or assignments except work schedules includable in item number GR1050-56.	1 year.					
*GR1050-32	WORKERS COMPENSATION CLAIM RECORDS	Records of accidents to or job-related illnesses of employees.		Retention Note: Refer to GR1050-22b(1) for any medical or exposure records created or collected.				
*GR1050-32a	WORKERS COMPENSATION CLAIM RECORDS	Initial and supplemental incident forms, reports, or logs.	CE + 5 years.	By regulation - 29 CFR 1904.33. Retention Note: If a claim is filed as a result of the accident or illness any forms or reports related to the incident must be retained under GR1050-32b.				
*GR1050-32b	WORKERS COMPENSATION CLAIM RECORDS	Records of workers compensation claims filed by employees, including any reports or investigations used to determine eligibility.						
		(1) If the local government is self-insured.	CE of closure of claim + 50 years.					
		(2) If the local government is not self-insured. CE + 5 years.	CE + 5 years.					

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*GR1050-33	FINANCIAL DISCLOSURE STATEMENTS	Financial disclosure statements of officers and/or employees of a local government required by Local Government Code Section 145.007(c) or 159.007(c).	Date of separation + 2 years.	By law – Local Government Code, Section 145.007(c); 159.007(c). Retention Notes: a) For campaign contribution and expenditure statements see item number EL3125-01 in Local Schedule EL (Records of Elections and Voter Registration).				
				b) See item number EL3125-04 for financial disclosure statements of local government candidates.				
*GR1050-34	PUBLIC ACCESS OPTION FORMS	Form completed and signed by employee or official, or former employee or official, electing to keep home address, home telephone number, social security number, and family information open or confidential under the Public Information Act, Government Code 552.024.	US.	Retention Note: The last public access option form completed by an employee prior to termination of employment must be retained as part of the Employee Service Record (see record number GR1050-12 in this schedule).				
GR1050-35	EMPLOYEE EXIT INTERVIEWS	Records of interviews and other supporting documentation conducted at time of employee termination.	Date of separation + 2 years.					

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GR1050-36	CRIMINAL HISTORY CHECKS	Used for condition of or in conjunction with employment application.	End of employee's probationary period or after immediate purpose has been fulfilled, as applicable.	By law - Government Code, Chapter 411 Subchapter F for certain education institutions and fire departments, and by authority of this schedule for all other local governments.				
				Retention Note: A local government that is authorized to obtain criminal history recorded information from the Texas Department of Public Safety must refer to Subchapter F, Chapter 411, Government Code for appropriate retention and use of this information.				
*GR1050-37	EMPLOYEE ACKNOWLEDGEMENT FORMS	Employee acknowledgement forms or other documentation that show proof of receipt and awareness of local government policies and procedures.	US or date of separation +2 years, as applicable.	Retention Note: See item number GR1050-08b for acknowledgement forms of pension and deferred compensation policies and procedures.				

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GR1050-38	UNSOLICITED RÉSUMÉS	Unsolicited résumés received by local governments not used in the employment selection process.	AV.	Retention Note: See item number GR1050-14 for résumés, whether solicited or unsolicited, that are used in any way in the employment selection process.				
GR1050-39	VOLUNTEER SERVICE FILES	Information about individual volunteers and duties they perform.	US or date of separation, as separation + 3 years. applicable.					
*GR1050-40	APPLICATIONS FOR PERMANENT EMPLOYMENT CERTIFICATION (ETA Form 9089)	Includes applications and supporting documentation, including employment applications, summaries of recruitment efforts, job postings, newspaper advertisements, job orders with the Texas Workforce Commission, and Correspondence with the U.S. Department of Labor and attorneys.	Date of filing of application + 5 years.					
*GR1050-41	OUTSIDE/SECONDARY EMPLOYMENT AUTHORIZATIONS	Personnel forms requesting permission to perform at a job outside of the local government.	Date of separation or until superseded + 2 years, as applicable.					

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Personnel Records -Disposition Log

Texas State Library & Archive Commission (TSLAC)					Record Disposition Log			
Record #	Record Title	Record Description	Retention Period	Remarks	No. of Boxes	Specific Content (attach addtnl doc to work order if necessary)	School Yr of Records	Disp Meth
*GR1050-42	LICENSE AND DRIVING RECORD CHECKS		US or date of separation.	Retention Note: See item number SD3500-03c for driving record checks of school bus drivers.				
*GR1050-43	LABOR STATISTICS REPORTS	Reports providing statistical information on labor force.	3 years.					
*GR1050-44	AMERICANS WITH DISABILITIES ACT (ADA) DOCUMENTATION	Self evaluations and plans documenting compliance with the requirements of the Americans with Disabilities Act.	3 years.	By regulation - 28 CFR 35.105(c).				

Total No. of Boxes: _____

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:	