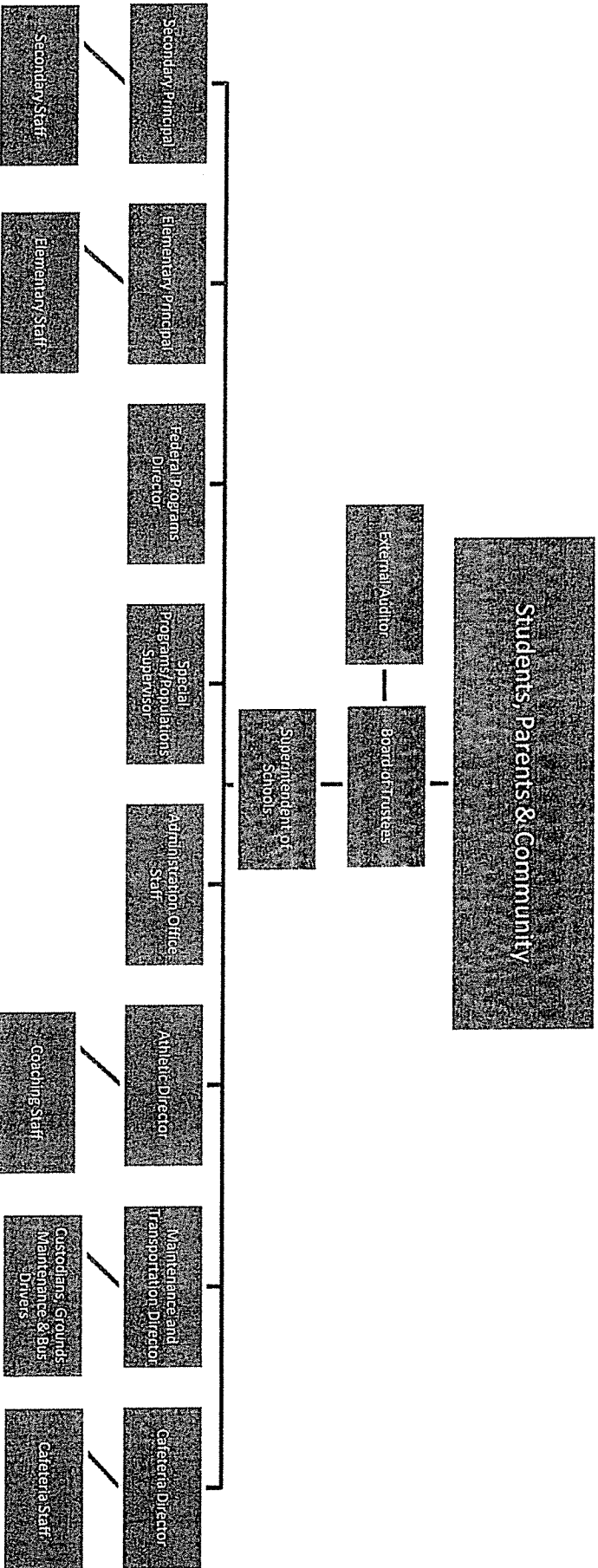


APPENDIX A

# Miles ISD Organizational Chart



APPENDIX B

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## An Administrator's Guide To SCHOOL FINANCE CODES

All campus and district staff responsible for budget management and tracking must understand the standardized Texas school finance accounting system.

Section 44.007 of the Texas Education Code requires that a standard fiscal accounting system be adopted by each public school district.

This guide includes:

- Accounting Code Structure and Definitions
- Fund Codes
- Function Codes
- Class Object Codes by Account Classification
- Organization Codes
- Program Intent Codes
- Frequently Used School Accounting Codes

## School Accounting Codes

All school finance accounting systems must meet the minimum requirements prescribed by the State Board of Education (SBOE), be subject to review and comment by the state auditor, and conform to the Generally Accepted Accounting Principles (GAAP). The Texas Education Code (TEC) further requires that a report be provided when the school district budget is filed, showing financial information sufficient to enable the SBOE to monitor the funding process and determine educational system costs by the school district, campus and programs.

The Governmental Accounting Standards Board (GASB) states the following objectives:

- Financial reporting should provide information to determine whether current-year revenues were sufficient to pay for current-year services.
- Financial reporting should demonstrate whether resources were obtained and used in accordance with the entity's legally adopted budget. It should also demonstrate compliance with other finance-related legal or contractual requirements.
- Financial reporting should provide information to assist users in assessing the service efforts, costs and accomplishments of the governmental entity.

The budgeting process is a continuous cycle of planning, preparation and evaluation. The process begins with defining the goals and objectives of campuses and the school district and developing programs to attain those goals and objectives. Once these programs and plans have been established, budgetary resource allocations are made to support them. Budgetary resource allocations are associated with the preparation phase of budgeting. The allocations cannot be made, however, until plans and programs have been established. Finally, the budget is evaluated for its effectiveness in attaining goals and objectives. Evaluation typically involves a review of how funds were expended, what outcomes resulted from the expenditure of funds, the degree these outcomes achieved the goals and objectives stated during the planning phase, and providing data to determine the following year's budgetary allocations.

Sections 44.002 through 44.006 of the Texas Education Code establish the legal basis for budget development in school districts. The following six items summarize the legal requirements from the code:

- The superintendent is the budget officer for the district and prepares or requires the budget to be prepared. Note: The Texas Education Agency (TEA) recommends an interactive approach between the board of trustees and the superintendent to establish the budget process and define related roles and responsibilities.
- The district budget must be prepared by a date set by the SBOE, currently August 20th (June 19th if the district uses a July 1st fiscal year start date).
- The president of the board of trustees must call a public meeting of the board of trustees and provide ten days public notice in a newspaper, for the adoption of the district budget. Any taxpayer in the district may be present and participate in the meeting.

- No funds may be expended in any manner other than as provided for in the adopted budget. The board does have the authority to amend the budget or adopt a supplementary emergency budget to cover unforeseen expenditures.
- The budget must be prepared in accordance with the Generally Accepted Accounting Principles and state guidelines.
- The budget must be legally adopted before the adoption of the tax rate. However, if a school district has a July 1st fiscal year start date, then a school district must not adopt a tax rate until after the district receives the certified appraisal roll for the district required by Section 26.01, Tax Code. Additionally, a school district must publish a revised notice and hold another public meeting before the district may adopt a tax rate that exceeds the following: (1) The rate proposed in the notice prepared using the estimate, or (2) The district's rollback rate determined under Section 26.08, Tax Code, using the certified appraisal roll.

TEA has developed additional requirements for school district budget preparation as follows:

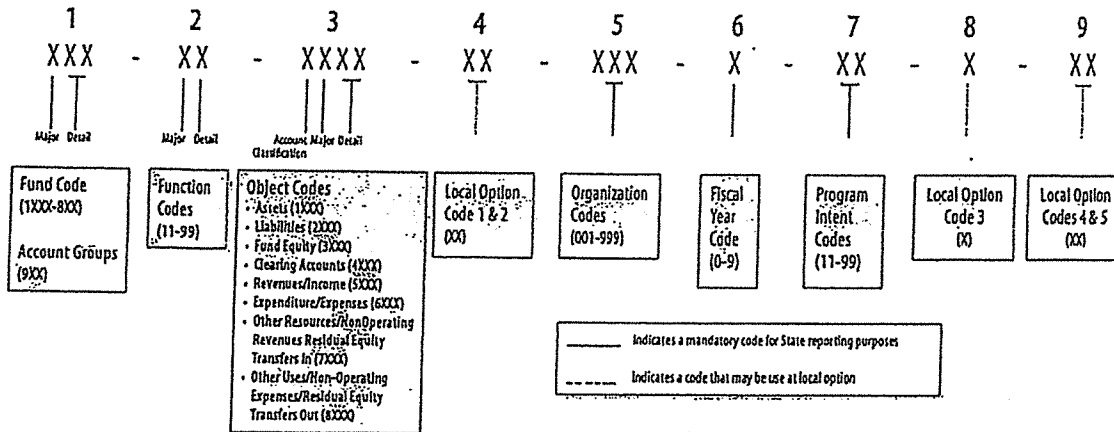
- The budget must be adopted by the board of trustees, inclusive of amendments, no later than August 31st (June 30th if the district uses a July 1st fiscal year start date).
- Minutes from district board meetings will be used by TEA to record adoption of and amendments to the budget.
- Budgets for the General Fund, the Food Service Fund (whether accounted for in the General Fund, a Special Revenue Fund or Enterprise Fund) and the Debt Service Fund must be included in the official district budget (legal or fiscal year basis). These budgets must be prepared and approved at least at the fund and function levels to comply with the state's legal level of control mandates.
- The officially adopted district budget, as amended, must be filed with TEA through PEIMS (Public Education Information Management System) by the date prescribed in the annual system guidelines. Revenues, other sources, other uses, and fund balances must be reported by fund, object (at the fourth level), fiscal year, and amount. Expenditures must be reported by fund, function, object (at the second level), organization, fiscal year, program intent and amount. These requirements are discussed in further detail in TEA's Data Collection and Reporting module.
- A school district must amend the official budget before exceeding a functional expenditure category, i.e., instruction, administration, etc., in the total district budget. The annual financial and compliance report should reflect the amended budget amounts on the schedule comparing budgeted and actual amounts. The requirement for filing the amended budget with TEA is satisfied when the school district files its Annual Financial and Compliance Report.
- HB 3, 81st Regular Session, added TEC 39.084 which requires that on final approval of the budget by the school board, the school district shall post on the district's Internet website a copy of the adopted budget. The website must prominently display the electronic link to the adopted budget until the third anniversary of the date the budget was adopted.

Source: Update 14 to the Financial Accountability System Resource Guide - January, 2010

# Accounting Code Structure

A major purpose of the following accounting code structure is to establish the standard school district fiscal accounting system required by law. Although certain codes may be used as local options, the sequence of the codes within the structure, and the funds and chart of accounts, are to be uniformly used by all public and charter schools.

## The Code Structure



### 1. Fund Code

A mandatory three-digit code is to be used for all financial transactions to identify the fund group and specific fund. The first digit refers to the fund group, and the second and third digits specify the fund (Fund Codes = 1xx - 8xx) (Account Groups = 9xx).

### 2. Function Code

A mandatory two-digit code applied to expenditures/expenses that identifies the purpose of the transaction. The first digit identifies the major class and the second digit refers to the specific function within the area (11-99).

### 3. Object (Class Object) Code

A mandatory four-digit code identifying the nature and object of an account, a transaction or a source. The first of the four digits identify the type of account or transaction, the second digit identifies the major area, and the third and fourth digits provide further sub-classifications (Assets = 1xxx; Liabilities = 2xxx; Fund Equity = 3xxx; Clearing Accounts = 4xxx; Revenue/Income = 5xxx; Expenditure/Expenses = 6xxx; Other Resources/Non-Operating Revenues/Residual Equity Transfers In = 7xxx; Other Uses/Non-Operating Expenses/Residual Equity Transfers Out = 8xxx).

### 4. Optional Codes 1 and 2 (Sub-Object Code)

A two-digit code for optional use to provide special accountability at the local level (two-digit code assigned and defined at the local level).

### 5. Organization Code

A mandatory three-digit code identifying the organization, i.e., high school, middle school, elementary school, superintendent's office, etc. An organization code does not necessarily correspond with a physical location. The activity, not the location, defines the organization. Campuses are examples of organization codes and are specified for each school district in the Texas School Directory (001-999 codes).

### 6. Fiscal Year Code

A mandatory single-digit code that identifies the fiscal year of the transaction or the project year of inception of a grant project (0-9 - Example: 2009-2010 = 0).

### 7. Program Intent Code

A two-digit code used to designate the intent of a program provided to students. These codes are used to account for the cost of instruction and other services that are directed toward a particular need of a specific set of students. The intent (the student group toward which the instructional or other service is directed) determines the program intent code, not the demographic makeup of the students served (11-99).

### 8. Optional Code 3

A single code that is used at the local option (assigned and defined at the local level).

### 9. Optional Codes 4 and 5

An optional two-digit code that may be used at the local level to further describe the transaction (assigned and defined at the local level).

## Fund Codes

<b>100 GENERAL FUND</b>	
101	Food Service
102	ESC State Support (ESCs Only)
161- 198	Locally Defined Classifications (Convert to Fund 199 for PEIMS)
199	General Fund—Public School District (see 420 General Fund for Charter Schools)
<b>200 SPECIAL REVENUE (FEDERAL PROGRAMS)</b>	
203	Child Care Development Block Grant
204	ESEA, Title IV, Part A—Safe and Drug Free Schools and Communities Act
205	Head Start
206	ESEA, Title X, Part C—Education for the Homeless Children and Youth
208	Human Immunodeficiency Virus (HIV) Education
209	Energy Conservation for Institutional Buildings
211	ESEA, Title I, Part A—Improving Basic Programs
212	ESEA, Title I, Part C—Education of Migratory Children
213	ESEA, Title I, Part B, Subpart 3—Even Start Family Literacy
218	ESEA, Title V, Part D, Subpart 6—Jacob K. Javits Gifted and Talented Students Education Act
220	Adult Education (ABE)—Federal
222	National and Community Service Trust Act— Learn and Serve America
223	Temporary Assistance for Needy Families (TANF)
224	IDEA, Part B—Formula
225	IDEA, Part B—Preschool
226	IDEA, Part B—Discretionary
227	IDEA, Part B—Deaf
228	IDEA, Part B—Preschool Deaf
229	IDEA, Part D—Deaf-Blind
230	IDEA, Part D—Personnel Training
236	Substance Abuse Prevention and Treatment Block Grant—Intervention
237	ESEA, Title IV Safe and Drug-Free Schools and Communities Act
238	Substance Abuse Prevention and Treatment Block Grant—Females
239	Substance Abuse Prevention and Treatment Block Grant—Prevention
240	National School Breakfast and Lunch Program
241	Education Service Center Child Nutrition
242	Summer Feeding Program, Texas Department of Agriculture (FDA)
243	Career and Technical—Technical Preparation
244	Career and Technical—Basic Grant
245	Career and Technical—Single Parent
246	Career and Technical—Sex Equity
247	Career and Technical—Curriculum Development
248	Career and Technical—Professional Development
249	Career and Technical—Community Based Organization
250	Career and Technical—Apprenticeship
251	Career and Technical—Quality Work Force
252	Career and Technical—Other Program Improvement
253	IDEA, Part C—Early Intervention (Deaf)
255	ESEA, Title II, Part A—Teacher and Principal Training and Recruiting
256	ESEA, Title I, Part F—Comprehensive School Reform
258	Public Charter Schools
259	Matching Funds for Library Purchases
261	Reading First
262	Title II, Part D, Subpart 1—Enhancing Education Through Technology
263	Title III, Part A—English Language Acquisition and Language Enhancement
264	Community Service Grant Program
265	Title IV, Part B—21st Century Community Learning Centers
266	State Fiscal Stabilization Fund (ARRA) through 9/2011
267	Improving Academic Achievement (Grants for State Assessments and Related Activities)
268	Improving Academic Achievement (Grants for Enhanced Assessment Instruments)
269	Title V, Part A—Innovative Programs
270	ESEA, Title VI, Part B, Rural and Low-Income School Program
271	Workforce Investment Act Youth Activities
272	Medicaid Administrative Claiming Program (MAC)
273	Mathematics and Science Partnerships
274	Gear Up
275	School Dropout Prevention
276	Title I SIP Academy Grant

- 279 Title II, Part D, Subpart 1-Enhancing Education Through Technology (ARRA) Stimulus
- 280 ESEA, Title X, Part C-Education for the Homeless Children and Youth (ARRA) Stimulus
- 283 IDEA, Part B, Formula (ARRA) Stimulus through 9/2011
- 284 IDEA, Part B Preschool (ARRA) Stimulus through 9/2011
- 285 ESEA, Title I, Part A-Improving Basic Programs (ARRA) Stimulus through 9/2011
- 286 Title I SIP Academy Grant (ARRA) Stimulus
- 287- Federally Funded Special Revenue Funds-  
288 Locally Defined (Convert to Fund 289 for PEIMS)
- 289 Federally Funded Special Revenue Funds
- 290 FEDERALLY FUNDED SSA
- 292 SSA, Child Care Development Block Grant
- 293 SSA, ESEA, Title IV, Part A-Safe and Drug Free Schools and Communities Act
- 294 SSA, Head Start
- 295 SSA, ESEA, Title X, Part C-Education for the Homeless Children and Youth
- 297 SSA, Human Immunodeficiency Virus (HIV) Education
- 298 SSA, Energy Conservation for Institutional Buildings
- 300 SSA, ESEA, Title I, Part A-Improving Basic Programs
- 301 SSA, ESEA, Title I, Part C-Education of Migratory Children
- 302 SSA, ESEA, Title I, Part B, Subpart 3-Even Start Family Literacy
- 307 SSA, ESEA, Title V, Part D, Subpart 6-Jacob K. Javits Gifted and Talented Students Education Act
- 309 SSA, Adult Basic Education (ABE)-Federal
- 311 SSA, National and Community Service Trust Act- Learn and Serve America
- 312 SSA, Temporary Assistance for Needy Families (TANF)
- 313 SSA, IDEA, Part B-Formula
- 314 SSA, IDEA, Part B-Preschool
- 315 SSA, IDEA, Part B-Discretionary
- 316 SSA, IDEA, Part B-Deaf
- 317 SSA, IDEA, Part B-Preschool Deaf
- 319 SSA, IDEA, Part D-Personnel Training
- 325 SSA, Substance Abuse Prevention and Treatment Block Grant-Intervention
- 326 SSA, ESEA, Title IV, Part A-Safe and Drug Free Schools and Communities Act
- 327 SSA, Substance Abuse Prevention and Treatment Block Grant-Females
- 328 SSA, Substance Abuse Prevention and Treatment Block Grant-Prevention
- 329 SSA, Summer Feeding Program, Texas Health and Human Services Commission (HHSC)
- 330 SSA, Career and Technical-Technical Preparation
- 331 SSA, Career and Technical-Basic Grant
- 332 SSA, Career and Technical-Single Parent
- 333 SSA, Career and Technical-Sex Equity
- 334 SSA, Career and Technical-Curriculum Development
- 335 SSA, Career and Technical-Professional Development
- 336 SSA, Career and Technical-Community-Based Organization
- 337 SSA, Career and Technical-Apprenticeship
- 338 SSA, Career and Technical-Quality Work Force
- 339 SSA, Career and Technical-Other Program Improvement
- 340 SSA, IDEA, Part C-Early Intervention (Deaf)
- 342 SSA, Title II, Part A-Teacher and Principal Training and Recruiting
- 343 SSA, ESEA, Title I, Part F-Comprehensive School Reform
- 347 SSA, ESEA, Title VI, Part B, Subpart 2-Rural and Low-Income School Program
- 348 SSA, Reading First
- 349 SSA, Title II, Part D, Subpart 1-Enhancing Education Through Technology
- 350 SSA, Title III, Part A-English Language Acquisition and Language Enhancement
- 351 SSA, Community Service Grant Program
- 352 SSA, 21st Century Community Learning Centers
- 354 SSA, Improving Academic Achievement (Grants for State Assessments and Related Activities)
- 355 SSA, Improving Academic Achievement (Grants for Enhanced Assessment Instruments)
- 356 SSA, Title V, Part A-Innovative Programs
- 357 SSA, Mathematics and Science Partnerships
- 358 SSA, Title I SIP Academy Grant
- 359 SSA, ESEA, Title I, Part A-Improving Basic Programs (ARRA)
- 360 SSA, Title I SIP Academy Grant (ARRA)
- 361 SSA, Title II, Part D, Subpart 1-Enhancing Education through Technology (ARRA)
- 364 SSA, IDEA, Part B (ARRA)



<i>Fund Codes continued</i>		409	High School Completion and Success/ Texas High School Project
365	SSA, IDEA, Part B, Preschool (ARRA)	410	State Textbook Fund
366	SSA, ARRA of 2009, Title XIV, State Fiscal Stabilization Fund	411	Technology Allotment
367	SSA, ESEA, Title X, Part C-Education for the Homeless Children and Youth (ARRA)	412	Public School Child Care Services
368- 378	Federally Funded SSA-Locally Defined (Convert to Fund 379 for PEIMS)	413	Telecommunication Infrastructure Fund
379	Federally Funded Shared Services Arrangements	414	Texas Reading Initiative/Texas Reading, Math and Science Initiative
380	<b>SPECIAL REVENUE FUNDS (STATE PROGRAMS)</b>	415	Kindergarten and Prekindergarten Grants
381	Adult Basic Education (ABE)-State	416	State Head Start
382	Temporary Assistance for Needy Families (TANF)-State TEC §29.252	417	Educational Technology (Ed Tech) Pilot
383	Professional Staff Development	419	Head Start-Ready to Read/Early Childhood School Readiness
384	Texas After School Initiative	420	General Fund Charter Schools Only
385	State Supplemental Visually Impaired (SSVI)	421	Master Reading Teacher
386	Regional Day School for the Deaf	422	Matching Funds for Library Purchases
387	Quality Work Force Planning-State	423	Limited English Proficient (LEP) Student Success Initiative
388	Innovative Education Grants	424	School Leadership Pilot program
389	Master Mathematics Teacher	425	Teacher Induction and Mentoring Program
390	Early Childhood Limited English Proficient (LEP) Summer Program	426	Texas Educator Excellence Award Grant Program
391	Year Round Schools Incentive	427	State Funded Special Revenue Funds-Locally Defined (Convert to Fund 429 for PEIMS)
392	Noneducational Community-Based Support	428	High School Allotment
393	Texas Successful Schools Program	429	State Funded Special Revenue Funds
394	Life Skills Program	430	<b>SSA, STATE/LOCAL FUNDED</b>
395	Comprehensive Developmental Guidance Program on Elementary Campuses for Students in At-Risk Situations Program	431	SSA, Adult Education-State/ Educational Technology (Ed Tech) Pilot
396	Communities in Schools	432	SSA, Temporary Assistance for Needy Families (TANF)-State
397	Advanced Placement Incentives	433	SSA, Professional Staff Development
398	Children's Trust Fund of Texas	434	SSA, State Supplemental Visually Impaired (SSVI)
399	Investment Capital Funds/Campus Deregulation and Restructuring to Improve Student Achievement	435	SSA, Regional Day School for the Deaf
400	School Health (ESCs Only)	436	SSA, Quality Work Force Planning-State
401	State-Funded Optional Extended-Year Program	437	SSA, Special Education
402	Texas Ready to Read Program	438	SSA, Public School Child Care Services
403	Certification (ESCs Only)	439	SSA, Texas Reading Initiative/Texas Reading, Math and Science Initiative
404	Student Success Initiative	440	SSA, Telecommunication Infrastructure Fund
405	Gifted and Talented (ESCs Only)	441	SSA, Head Start-Ready to Read/Early Childhood School Readiness
406	Teacher Recruitment (ESCs Only)	442	SSA, Limited English Proficient (LEP) Student Success Initiative
407	Bilingual Education (ESCs Only)		
408	Technology (ESCs Only)		

- 446- State/Local Funded Shared Services Arrangements-Locally Defined (Convert to Fund 459 for PEIMS)
- 458
- 459 SSA, State/Local Funded Educational Programs (Includes Local/State Supplement to Federal)
- 460 SPECIAL REVENUE FUNDS (LOCAL PROGRAMS)
- 461 Campus Activity Funds (see Fund 865 for Student Activity Funds)
- 472- Permanent Funds-Locally Defined
- 478 (Convert to Fund 499 for PEIMS)
- 479 Permanent Fund
- 480- Locally Funded Special Revenue Funds-Locally
- 498 Defined (Convert to Fund 499 for PEIMS)
- 499 Locally Funded Special Revenue Funds
- 500 DEBT SERVICE FUNDS
- 511- Debt Service Funds-Locally Defined
- 598 (Convert to Fund 599 for PEIMS)
- 599 Debt Service Funds
- 600 CAPITAL PROJECTS FUNDS
- 616- Capital Projects Funds-Locally Defined
- 698 (Convert to Fund 699 for PEIMS)
- 699 Capital Project Funds
- 700-749 ENTERPRISE FUNDS
- 701 Enterprise Fund-National School Breakfast and Lunch Program (Report Budget and Actual Expenditures through PEIMS)
- 711- Enterprise Funds-Locally Defined (Not Reported
- 748 to PEIMS-Convert to 749 for PEIMS Payroll Reporting Only)
- 749 Enterprise Funds (Only Reported to Payroll Record in PEIMS)
- 750-799 INTERNAL SERVICE FUNDS
- 751 Transportation (Not Reported to PEIMS)
- 752 Print Shop (Not Reported to PEIMS)
- 753 Insurance (Not Reported to PEIMS)
- 754 Computer Operations (Not Reported to PEIMS)
- 755 Public Entity Risk Pool (Not Reported to PEIMS)
- 770- Internal Service Funds-Locally Defined (Not
- 798 Reported to PEIMS)
- 799 Internal Service Funds (Not Reported to PEIMS)
- 800 TRUST FUNDS
- 810 Private-Purpose Trust Funds-Locally Defined (Not Reported to PEIMS)
- 816- Private-Purpose Trust Funds-Locally Defined
- 828 (Not Reported to PEIMS)
- 829 Private-Purpose Trust Funds (Not Reported to PEIMS)

- 830 INVESTMENT TRUST FUND
- 836- Investment Trust Funds-Locally Defined
- 848 (Not Reported to PEIMS)
- 849 Investment Trust Funds-(Not Reported to PEIMS)
- 850 PENSION AND OTHER EMPLOYEE BENEFIT TRUST FUNDS
- 851- Pension and Other Employee Benefit Trust
- 858 Funds-Locally Defined (Not Reported to PEIMS)
- 859 Pension and Other Employee Benefit Trust Funds (Not Reported to PEIMS)
- 860 AGENCY FUNDS
- 861 Agency Fund for Tax Collections (Not Reported to PEIMS)
- 862 Agency Fund for Textbook Waiver Refunds (Not Reported to PEIMS)
- 865 Student Activity Account (Not Reported to PEIMS) (See Fund 461 for Campus Activity Funds)
- 876- Locally Defined Agency Funds
- 898 (Not Reported to PEIMS)
- 899 Agency Funds (Not Reported to PEIMS)
- 900 GENERAL CAPITAL ASSETS AND LONG-TERM DEBT
- 901 General Capital Assets (Not reported to PEIMS)
- 902 Long-Term Debt (Not Reported to PEIMS)

## Function Codes

- 11 Instruction
- 12 Instructional Resources and Media Services
- 13 Curriculum Development and Instructional Staff Development
- 21 Instructional Leadership
- 23 School Leadership
- 31 Guidance, Counseling and Evaluation Services
- 32 Social Work Services
- 33 Health Services
- 34 Student (Pupil) Transportation
- 35 Food Services
- 36 Extracurricular Activities
- 41 General Administration
- 51 Facilities Maintenance and Operations
- 52 Security and Monitoring Services
- 53 Data Processing Services
- 61 Community Services
- 62 School District Administrative Support Services (Used by ESCs Only)

Function Codes *continued*

71	Debt Service
81	Facilities Acquisition and Construction
91	Contracted Instructional Services Between Public Schools
92	Incremental Costs Associated with Chapter 41, Texas Education Code, Purchase or Sale of Weighted Average Daily Attendance
93	Payments to Fiscal Agent/Member Districts of Shared Services Arrangements
95	Payments to Juvenile Justice Alternative Education Programs
97	Payments to Tax Increment Fund
99	Other Intergovernmental Charges

**Class Object Codes**

## Asset Class Object Codes

## 1000 ASSETS AND OTHER DEBITS

1101-	Cash and Cash Equivalents
1109	
1110	Cash and Cash Equivalents
1120	Investments-Current
1200	RECEIVABLES
1210	Property Taxes-Current
1220	Property Taxes-Delinquent
1230	Allowance for Uncollectible Taxes (Credit)
1240	DUE FROM OTHER GOVERNMENTS
1241	Due from State
1242	Due from Federal Agencies
1243	Due from Other Governments
1250	Accrued Interest
1260	DUE FROM OTHER FUNDS
1261	General Fund
1262	Special Revenue Fund
1263	Debt Service Fund
1264	Capital Projects Fund
1265	Enterprise Fund
1266	Internal Service Fund
1267	Trust and Agency Funds
1268	Permanent Funds
1290	Other Receivables
1300	INVENTORIES
1310	Inventories-Supplies and Materials

## 1400 OTHER CURRENT ASSETS

1410	Deferred Expenditures/Expenses
1420	Capitalized Bond and Other Debt Issuance Costs
1490	Other Current Assets
1500	LAND, BUILDINGS AND EQUIPMENT
1510	Land Purchase and Improvements
1520	Buildings and Improvements
1530	FURNITURE AND EQUIPMENT
1531	Vehicles
1539	Furniture and Equipment
1540	CAPITAL ASSETS-DISTRICT DEFINED
1541	Vehicles
1549	Furniture and Equipment
1550	ASSETS PURCHASED UNDER CAPITAL LEASES
1551	Buildings
1559	Furniture and Equipment
1560	LIBRARY BOOKS AND MEDIA
1569	Library Books and Media
1570	ACCUMULATED DEPRECIATION
1571	Accumulated Depreciation-Buildings
1572	Accumulated Depreciation-Vehicles
1573	Accumulated Depreciation-Furniture and Equipment
1574	Accumulated Depreciation-Library Books and Media
1576	Accumulated Depreciation-Capital Leases
1577	Accumulated Depreciation-Infrastructure
1578	Accumulated Depreciation-Art and Collections
1579	Accumulated Depreciation-Historical Treasures
1580	Construction in Progress
1590	OTHER CAPITAL ASSETS-INFRASTRUCTURE, ART, HISTORICAL TREASURES, AND COLLECTIONS
1591	Infrastructure Assets-Roads
1592	Infrastructure Assets-Drainage Systems
1593	Infrastructure Assets-Water Systems
1594	Infrastructure Assets-Sewer Systems
1595	Infrastructure Assets-Lighting Systems
1596	Infrastructure Assets-Other
1597	Infrastructure Assets-Network or Subsystems of a Network
1598	Art and Collections
1599	Historical Treasures

1800 RESTRICTED ASSETS

- 1810 Cash and Temporary Investments
- 1890 Other Restricted Assets
- 1900 OTHER ASSETS
- 1910 Long-Term Investments
- 1990 Other Assets

Liability Class Object Codes

2000 LIABILITIES

2100 CURRENT PAYABLES

- 2110 Accounts Payable
- 2120 BONDS AND LOANS PAYABLE--CURRENT YEAR
- 2121 Bonds Payable--Current Year
- 2122 Loans Payable--Current Year
- 2123 Other Liabilities--Current
- 2130 Capital Leases Payable--Current Year

2140 INTEREST PAYABLE

- 2141 Bond Interest Payable
- 2142 Loan Interest Payable
- 2143 Capital Lease Interest Payable

2150 PAYROLL DEDUCTIONS AND WITHHOLDINGS

- 2151 Federal Income Taxes
- 2152 FICA and Medicare Taxes
- 2153 Group Health and Life Insurance
- 2154 Credit Union
- 2155 Teacher Retirement
- 2159 Other
- 2160 Accrued Wages Payable

2170 DUE TO OTHER FUNDS

- 2171 General Fund
- 2172 Special Revenue Fund
- 2173 Debt Service Fund
- 2174 Capital Projects Fund
- 2175 Enterprise Fund
- 2176 Internal Service Fund
- 2177 Trust and Agency Funds
- 2178 Permanent Funds

2180 DUE TO OTHER GOVERNMENTS

- 2181 Due to State
- 2182 Due to Federal Agencies
- 2183 Due to Other Governments
- 2184 Due to Government Unit--Taxes

2190 Due to Student Groups

2200 ACCRUED EXPENDITURES/EXPENSES

2210 Accrued Expenditures/Expenses

2300 DEFERRED REVENUE

2310 Deferred Revenue

2400 PAYABLE FROM RESTRICTED ASSETS

2410 Construction Contract

2420 Fiscal Agent

2430 Accrued Interest

2440 Other

2500 BONDS AND LOANS PAYABLE--LONG-TERM

2510 Bonds Payable--Long-Term

2511 Deferred Gain/Loss on Defeasance of Bonds

2512 Accumulated Accretion on Capital Appreciation Bonds

2516 Premium Discount on Issuance of Bonds

2520 Loans Payable--Long-Term

2530 OTHER LONG-TERM DEBT PAYABLE

2531 Capital Leases Payable--Long-Term

2532 Vested Vacation Benefits Payable

2590 Other Long-Term Liabilities

Fund Equity/Fund Net Assets Class Object Codes

3000 FUND EQUITY/FUND NET ASSETS

3200 INVESTED IN CAPITAL ASSETS, NET OF RELATED DEBT

3400-3600 FUND BALANCE

3400 RESERVED/NONSPENDABLE OR RESTRICTED FUND BALANCE

3410 Reserve for Investment in Inventories/ Nonspendable Inventories

3415 Nonspendable Long-Term Loans/ Notes Receivable

3425 Nonspendable Endowment Principal

3430 Reserve for Prepaid Items/Nonspendable Prepaid Items

3445 Nonspendable Other

3450 Reserve for Food Service/Restricted for Federal/State Funds Grant Restrictions

3460 Reserve/Restricted for Fund Balances of Consolidated School Districts

3470 Reserve/Restricted for Capital Acquisition and Contractual Obligations

3480 Restricted for Retirement of Long-Term Debt

3490 Other Reserves of Fund Balance

## Class Object Codes continued

<b>3500 DESIGNATED COMMITTED OR ASSIGNED FUND BALANCE</b>	<b>5721</b> Local Revenues Resulting from Sale of Weighted Average Daily Attendance to Other School Districts
3510 Designated/Committed Fund Balance—Construction	5722 SSA, Local Revenues from Member Districts
3520 Designated/Committed Fund Balance—Claims and Judgments	5723 SSA, Local Revenues from Fiscal Agent
3525 Committed Fund Balance—Retirement of Loans/Notes Payable	5727- Local Revenues Resulting from Services Rendered to Other School Districts—Locally Defined (Convert to Object Code 5729 for PEIMS)
3530 Designated/Committed Fund Balance—Capital Expenditures for Equipment	5728
3540 Designated/Committed Fund Balance—Self-Insurance	5729 Local Revenues Resulting from Services Rendered to Other School Districts
3545 Other Committed Fund Balance	<b>5730 TUITION AND FEES</b>
3550 Assigned Fund Balance—Construction	5735- Tuition and Fees—Locally Defined
3560 Assigned Fund Balance—Claims and Judgments	5738 (Convert to Object Code 5739 for PEIMS)
3565 Assigned Fund Balance—Retirement of Loans/Notes Payable	5739 Tuition and Fees from Local Sources
3570 Assigned Fund Balance—Capital Expenditures for Equipment	<b>5740 OTHER REVENUES FROM LOCAL SOURCES</b>
3580 Assigned Fund Balance—Self-Insurance	5741 Earnings from Permanent Funds and Endowments
3590 Other Designated/Assigned Fund Balance	5742 Earnings from Temporary Deposits and Investments
3600 Unreserved, Undesignated Fund Balance	5743 Rent
3700 Budgetary Fund Balance	5744 Revenue from Foundations, Other Non-Profit Organizations, Gifts and Bequests
3800 Restricted Net Assets	5745 Insurance Recovery
3900 Unrestricted Fund Balance	5746 Property Taxes Collected for Tax Increment Fund
<b>Clearing Account Class Object Codes</b>	5748 Other Revenues from Local Sources—Locally Defined (Convert to Object Code 5749 for PEIMS)
4000 CLEARING ACCOUNTS	5749 Other Revenues from Local Sources
4300 ENCUMBRANCE RESERVES	<b>5750 REVENUES FROM CO-CURRICULAR, ENTERPRISING SERVICES OR ACTIVITIES</b>
4310 Reserve for Encumbrances—Locally Defined	5751 Food Service Activity
<b>Revenue Codes</b>	5752 Athletic Activities
<b>5000 REVENUE CONTROL ACCOUNTS</b>	5753 Extracurricular Activities Other than Athletics
5010 Estimated Revenues—Control—Locally Defined	5754 Interfund Service Provided and Used Interfund Transactions
5020 Realized Revenues—Control—Locally Defined	5755 Enterprising Services Revenue
<b>5700 REVENUES FROM LOCAL AND INTERMEDIATE SOURCES</b>	5757- Co-curricular, Enterprising Services or Activities
<b>5710 LOCAL REAL AND PERSONAL PROPERTY TAXES</b>	5758 —Locally Defined (Convert to Object Code 5759 for PEIMS)
5711 Taxes, Current Year Levy	5759 Co-curricular, Enterprising Services or Activities
5712 Taxes, Prior Years	<b>5760 REVENUES FROM INTERMEDIATE SOURCES</b>
5716- Penalties, Interest and Other Tax Revenues—Locally Defined (Convert to Object Code 5719 for PEIMS)	5766- Revenues from Intermediate Sources—Locally Defined (Convert to Object Code 5769 for PEIMS)
5719 Penalties, Interest and Other Tax Revenues	5768
<b>5720 LOCAL REVENUES REALIZED AS A RESULT OF SERVICE RENDERED TO OTHER SCHOOL DISTRICTS</b>	5769 Miscellaneous Revenues from Intermediate Sources

- 5800 STATE PROGRAM REVENUES
- 5810 PER CAPITA AND FOUNDATION SCHOOL PROGRAM ACT REVENUES
- 5811 Per Capita Apportionment
- 5812 Foundation School Program Act Entitlements
- 5813 Foundation School Program Act Incentive Aid
- 5817- Foundation School Program Act Revenues-  
5818 Locally Defined (Convert to Object Code 5819 for PEIMS)
- 5819 Other Foundation School Program Act Revenues
- 5820 STATE PROGRAM REVENUES DISTRIBUTED BY TEXAS EDUCATION AGENCY
- 5826- Revenues from Other State Programs-Locally  
5828 Defined (Convert to Object Code 5829 for PEIMS)
- 5829 State Program Revenues Distributed by Texas Education Agency
- 5830 STATE REVENUES FROM STATE OF TEXAS GOVERNMENT AGENCIES (OTHER THAN TEXAS EDUCATION AGENCY)
- 5831 Teacher Retirement/TRS Care-On-Behalf Payments
- 5836- State Revenues from State of Texas Government  
5838 Agencies (Other than Texas Education Agency) - Locally Defined (Convert to Object Code 5839 for PEIMS)
- 5839 State Revenues from State of Texas Government Agencies (Other than Texas Education Agency)
- 5840 SSA, STATE REVENUES
- 5841 SSA, State Revenues from Member Districts
- 5842 SSA, State Revenues from Fiscal Agent
- 5846- SSA, State Revenues Locally Defined  
5848 (Convert to Object Code 5849 for PEIMS)
- 5849 SSA, State Revenues
- 5900 FEDERAL PROGRAM REVENUES
- 5910 FEDERAL REVENUES DISTRIBUTED THROUGH GOVERNMENT ENTITIES OTHER THAN STATE OR FEDERAL AGENCIES
- 5916- Federal Revenues Distributed Through  
5918 Government Entities Other than State or Federal Agencies-Locally Defined (Convert to Object Code 5919 for PEIMS)
- 5919 Federal Revenues Distributed Through Government Entities Other than State or Federal Agencies
- 5920 FEDERAL REVENUES DISTRIBUTED BY THE TEXAS EDUCATION AGENCY
- 5921 School Breakfast Program
- 5922 National School Lunch Program
- 5923 United States Department of Agriculture (USDA) Commodities
- 5927- Federal Revenues Distributed by Texas Education  
5928 Agency-Locally Defined (Convert to Object Code 5929 for PEIMS)
- 5929 Federal Revenues Distributed by Texas Education Agency
- 5930 FEDERAL REVENUES DISTRIBUTED BY OTHER STATE OF TEXAS GOVERNMENT AGENCIES (OTHER THAN TEXAS EDUCATION AGENCY)
- 5931 School Health and Related Services (SHEARS)
- 5932 Medicaid Administrative Claiming Program (MAC)
- 5936- Federal Revenues Distributed by State of Texas  
5938 Government Agencies (Other than Texas Education Agency)-Locally Defined (Convert to Object Code 5939 for PEIMS)
- 5939 Federal Revenues Distributed by State of Texas Government Agencies (Other than Texas Education Agency)
- 5940 FEDERAL REVENUES DISTRIBUTED DIRECTLY FROM THE FEDERAL GOVERNMENT
- 5941 Impact Aid (84.041)
- 5946- Federal Revenues Distributed Directly from the  
5948 Federal Government-Locally Defined (Convert to Object Code 5949 for PEIMS)
- 5949 Federal Revenues Distributed Directly from the Federal Government
- 5950 SSA, FEDERAL REVENUES
- 5951 SSA, Federal Revenues from Member Districts
- 5952 SSA, Federal Revenues from Fiscal Agent
- 5956- SSA, Federal Revenues-Locally Defined  
5958 (Convert to Object Code 5959 for PEIMS)
- 5959 SSA, Federal Revenues
- Expenditure-Expense Class Object Codes
- 6000 EXPENDITURE/EXPENSE CONTROL ACCOUNTS
- 6010 Appropriated Expenditures/Expense-Control - Locally Defined
- 6020 Encumbrances-Control-Locally Defined
- 6030 Expenditures/Expenses-Control-Locally Defined
- 6100 PAYROLL COSTS
- 6110 TEACHERS AND OTHER PROFESSIONAL PERSONNEL
- 6112 Salaries or Wages for Substitute Teachers
- 6116- Salaries or Wages for Teachers and Other  
6118 Professional Personnel-Locally Defined (Convert to Object Code 6119 for PEIMS)

## Class Object Codes continued

- 6119 Salaries or Wages—Teachers and Other Professional Personnel
- 6120 SUPPORT PERSONNEL
- 6121 Extra Duty Pay/Overtime—Support Personnel
- 6122 Salaries or Wages for Substitute Support Personnel
- 6125- Salaries or Wages for Support Personnel—  
6128 Locally Defined (Convert to Object Code 6129 for PEIMS)
- 6129 Salaries or Wages for Support Personnel
- 6130 EMPLOYEE ALLOWANCES
- 6131 Contract Buyouts
- 6134- Employee Allowances—Locally Defined  
6138 (Convert to Object Code 6139 or PEIMS)
- 6139 Employee Allowances
- 6140 EMPLOYEE BENEFITS
- 6141 Social Security/Medicare
- 6142 Group Health and Life Insurance
- 6143 Workers' Compensation
- 6144 Teacher Retirement/TRS Care—On-Behalf Payments
- 6145 Unemployment Compensation
- 6146 Teacher Retirement/TRS Care
- 6148 Employee Benefits—Locally Defined (Convert to Object Code 6149 for PEIMS)
- 6149 Employee Benefits
- 6200 PROFESSIONAL AND CONTRACTED SERVICES
- 6210 PROFESSIONAL SERVICES
- 6211 Legal Services
- 6212 Audit Services
- 6213 Tax Appraisal and Collection
- 6214 Lobbying
- 6216- Professional Services—Locally Defined  
6218 (Convert to Object Code 6219 for PEIMS)
- 6219 Professional Services/Consultants
- 6220 TUITION AND TRANSFER PAYMENTS
- 6221 Staff Tuition and Related Fees—Higher Education
- 6222 Student Tuition—Public Schools
- 6223 Student Tuition—Other than Public Schools
- 6224 Student Attendance Credits
- 6227- Tuition—Locally Defined  
6228 (Convert to Object Code 6229 for PEIMS)
- 6229 Tuition and Transfer Payments
- 6230 EDUCATION SERVICE CENTER SERVICES
- 6234- Education Service Center Services—Locally  
6238 Defined (Convert to Object Code 6239 for PEIMS)
- 6239 Education Service Center Services
- 6240 CONTRACTED MAINTENANCE AND REPAIR SERVICES
- 6244- Contracted Maintenance and Repair—Locally  
6248 Defined (Convert to Object Code 6249 for PEIMS)
- 6249 Contracted Maintenance and Repair
- 6250 UTILITIES
- 6255- Utilities—Locally Defined  
6258 (Convert to Object Code 6259 for PEIMS)
- 6259 Utilities
- 6260 RENTALS—OPERATING LEASES
- 6264- Rentals—Operating Leases—Locally Defined  
6268 (Convert to Object Code 6269 for PEIMS)
- 6269 Rentals—Operating Leases
- 6290 MISCELLANEOUS CONTRACTED SERVICES
- 6291 Consulting Services
- 6294- Miscellaneous Contracted Services—Locally  
6298 Defined (Convert to Object Code 6299 for PEIMS)
- 6299 Miscellaneous Contracted Services
- 6300 SUPPLIES AND MATERIALS
- 6310 SUPPLIES AND MATERIALS FOR MAINTENANCE AND/OR OPERATIONS
- 6311 Gasoline and Other Fuels for Vehicles (Including Buses)
- 6315- Supplies for Maintenance and/or Operations  
6318 —Locally Defined (Convert to Object Code 6319 for PEIMS)
- 6319 Supplies for Maintenance and/or Operations
- 6320 TEXTBOOKS AND OTHER READING MATERIALS
- 6321 Textbooks
- 6325- Reading Materials—Locally Defined  
6328 (Convert to Object Code 6329 for PEIMS)
- 6329 Reading Materials
- 6330 TESTING MATERIALS
- 6334- Testing Materials—Locally Defined  
6338 (Convert to Object Code 6339 for PEIMS)
- 6339 Testing Materials
- 6340 FOOD SERVICE AND OTHER RESALE ITEMS
- 6341 Food
- 6342 Non-Food

6343	Items for Sale	6512	Capital Lease Principal
6344	USDA Commodities	6513	Long-Term Debt Principal
6348	Food Supplies--Locally Defined (Convert to Object Code 6349 for PEIMS)	6517-	Debt Service--Locally Defined (Convert to
6349	Food Service Supplies	6518	Object Code 6519 for PEIMS)
6390	SUPPLIES AND MATERIALS--GENERAL	6519	Debt Principal
6395-	Supplies and Materials--Locally Defined	6520	INTEREST EXPENDITURES/EXPENSES
6398	(Convert to Object Code 6399 for PEIMS)	6521	Interest on Bonds
6399	General Supplies	6522	Capital Lease Interest
6400	OTHER OPERATING COSTS	6523	Interest on Debt
6410	TRAVEL, SUBSISTENCE AND STIPENDS	6524	Amortization of Bond and Other Debt Related Costs
6411	Travel and Subsistence--Employee Only	6525	Amortization of Premium and Discount on Issuance of Bonds
6412	Travel and Subsistence--Students	6527-	Interest Expenditures/Expenses--Locally
6413	Stipends--Non-Employees	6528	Defined (Convert to Object Code 6529 for PEIMS)
6417-	Travel and Subsistence--Locally Defined	6529	Interest Expenditures/Expenses
6418	(Convert to Object Code 6419 for PEIMS)	6590	OTHER DEBT SERVICE EXPENDITURES/EXPENSES
6419	Travel and Subsistence--Non-Employees	6594-	Other Debt Service Expenditures/Expenses--
6420	INSURANCE AND BONDING COSTS	6598	Locally Defined (Convert to Object Code 6599 for PEIMS)
6425-	Insurance and Bonding Costs--Locally Defined	6599	Other Debt Service Fees
6428	(Convert to Object Code 6429 for PEIMS)	6600	CAPITAL OUTLAY
6429	Insurance and Bonding Costs	6610	LAND PURCHASE AND IMPROVEMENT
6430	ELECTION COSTS	6614-	Land Purchase and Improvements--Locally
6434-	Election Costs--Locally Defined	6618	Defined (Convert to Object Code 6619 for PEIMS)
6438	(Convert to Object Code 6439 for PEIMS)	6619	Land Purchase and Improvement
6439	Election Costs	6620	BUILDING PURCHASE, CONSTRUCTION OR IMPROVEMENTS
6440	DEPRECIATION EXPENSE OF PROPRIETARY AND NONEXPENDABLE TRUST FUNDS	6624-	Building Purchase, Construction or
6444-	Depreciation Expense--Locally Defined	6628	Improvements--Locally Defined
6448	(Convert to Object Code 6449 for PEIMS)	6629	(Convert to Object Code 6629 for PEIMS)
6449	Depreciation Expense	6629	Building Purchase, Construction for Improvements
6490	MISCELLANEOUS OPERATING COSTS	6630	FURNITURE AND EQUIPMENT
6492	Payments to Fiscal Agents of Shared Services Arrangements	6631	Vehicles per unit cost of \$5,000 or more
6493	Payments to Member Districts of Shared Services Arrangements	6635-	Furniture and Equipment--Locally Defined
6494	Reclassified Transportation Expenditures/Expenses	6638	(Convert to Object Code 6639 for PEIMS)
6495	Dues	6639	Furniture, Equipment and Software
6497-	Miscellaneous Operating Costs--Locally Defined	6640	CAPITAL ASSETS--DISTRICT DEFINED
6498	(Convert to Object Code 6499 for PEIMS)	6641	Vehicles per unit cost of less than \$5,000
6499	Miscellaneous Operating Costs	6644-	Capital Assets--Locally Defined
6500	DEBT SERVICE	6648	(Convert to Object Code 6649 for PEIMS)
6510	DEBT PRINCIPAL	6649	Capital Assets--Other--Locally Defined Groupings
6511	Bond Principal		



Class Object Codes *continued*

- 6650 CAPITAL ASSETS UNDER CAPITAL LEASES
- 6651 Capital Lease of Buildings
- 6654- Capital Assets Under Capital Lease -Locally  
6658 Defined (Convert to Object Code 6659  
for PEIMS)
- 6659 Capital Lease of Furniture, Equipment  
and Software
- 6660 LIBRARY BOOKS AND MEDIA
- 6665- Library Books and Media-Locally Defined  
6668 (Convert to Object Code 6669 for PEIMS)
- 6669 Library Books and Media
- Other Resources-Non-Operating Revenue-  
Transfers In Class Object Codes**
- 7000 OTHER RESOURCES NON-OPERATING REVENUES
- 7070 Estimated Other Resources/Non-Operating  
Revenues Control-Local Option
- 7020 Realized Other Resources/Non-Operating  
Revenues -Control-Local Option
- 7900 OTHER RESOURCES/NON-OPERATING REVENUE
- 7910 OTHER RESOURCES
- 7911 Issuance of Bonds
- 7912 Sale of Real and Personal Property
- 7913 Proceeds from Capital Leases
- 7914 Loan Proceeds-Governmental Fund Types and  
Expendable Trust Funds Only (Non-Current)
- 7915 Operating Transfers In
- 7916 Premium or Discount on Issuance of Bonds
- 7917 Prepaid Interest
- 7918 Special Items
- 7919 Extraordinary Items
- 7940- Other Resources-Locally Defined (Convert to  
7948 Object Code 7949 for PEIMS)
- 7949 Other Resources
- 7950 NON-OPERATING REVENUES (PROPRIETARY FUND  
TYPES AND SIMILAR TRUST FUNDS ONLY)**
- 7951 Gain in Sale of Real and Personal Property
- 7952 National School Breakfast Program
- 7953 National School Lunch Program
- 7954 United States Department of Agriculture (USDA)  
Commodities
- 7955 Earnings from Temporary Deposits  
and Investments
- 7956 Insurance Recovery

7957 Contributed Capital

7980- Non-Operating Revenues-Locally Defined  
7988 (Convert to 7989 for PEIMS)

7989 Other Non-Operating Revenues

**Other Uses-Non-Operating Expenses****Class Object Codes**

- 8000 OTHER USES/NON-OPERATING EXPENSES
- 8010 Appropriated Other Uses/Non-Operating  
Expenses-Control-Locally Defined
- 8020 Encumbered Other Uses/Non-Operating  
Expenses -Control-Locally Defined
- 8030 Actual Other Uses/Non-Operating Expenses-  
Locally Defined
- 8900 OTHER USES/SPECIAL ITEMS/EXTRAORDINARY ITEMS/  
NON-OPERATING EXPENSES
- 8910 OTHER USES
- 8911 Operating Transfers Out
- 8912 Special Items
- 8913 Extraordinary Items
- 8940- Other Uses-Locally Defined (Convert to Account  
8948 8949 for PEIMS)
- 8949 Other Uses
- 8950 NON-OPERATING EXPENSES**
- 8951 Loss on Sale of Real and Personal Property
- 8960- Non-Operating Expenses-Locally Defined  
8988 (Convert to Account 8989 for PEIMS)
- 8989 Non-Operating Expenses

## Organization Codes

001-040	High School Campuses
041-100	Junior High/Middle School Campuses
101-698	Elementary School Campuses
699	Summer School Organization
701	Organization Unit—Superintendent's Office
702	Organization Unit—School Board
703	Organization Unit—Tax Costs
709-719	Organization Unit—Direct Costs—Locally Defined (Convert to Organization Code 720 for PEIMS)
720	Organization Unit—Direct Costs in Function 41 (General Administration)
726-749	Organization Unit—Indirect Costs—Locally Defined (Convert to Organization Code 750 for PEIMS)
750	Organization Units—Indirect Costs in Function 41 (General Administration), including Business Office/Personnel/Payroll/Human Resources/Purchasing
751	Fiscal Agent Shared Services Arrangements
752-799	Organization Units—Reserved for Future State Definition
800-997	Organization Units—Locally Defined (Convert to Organization Code 999 for PEIMS)
998	Unallocated Organization Unit—Local Option
999	Undistributed Organization Unit

## Program Intent Codes

11	Basic Educational Services
21	Gifted and Talented
22	Career and Technical
23	Services to Students with Disabilities (Special Education)
24	Accelerated Education (includes State Compensatory Education funds not combined on a Title I, Part A schoolwide program and any other funds dedicated to accelerated instruction)
25	Bilingual Education and Special Language Programs
26	Nondisciplinary Alternative Education Programs—AEP Services
28	Disciplinary Alternative Education Program—DAEP Basic Services
29	Disciplinary Alternative Education Program—DAEP State Compensatory Education Supplemental Costs
30	Title I, Part A—Schoolwide Activities Related to State Compensatory Education Costs on Campuses with 40% or More Educationally Disadvantaged Students (associated with the Foundation School Program—State Compensatory Education Funds and Fund Code 199 or Net Asset Code 420 for Charter Schools)
31	High School Allotment
71-8X	Reserved for use by Education Service Centers
91	Athletics and Related Activities
99	Miscellaneous, Undistributed

## Fiscal Year Codes

2009-2010 = 0
2010-2011 = 1
2011-2012 = 2
2012-2013 = 3
2013-2014 = 4
2014-2015 = 5
2015-2016 = 6

For additional information regarding school finance and accounting, go to <http://www.tea.state.tx.us> > School Finance or reference the Financial Accountability System Resource Guide at <http://www.tea.state.tx.us> > Financial Accountability System Resource Guide.

## Frequently Used School Accounting Codes

### Fund Codes

199	General Fund
211	ESEA, Title I, Part A—Improving Basic Programs
212	ESEA, Title I, Part C—Education of Migratory Children
224	IDEA, Part B—Formula
225	IDEA, Part B—Preschool
226	IDEA, Part B—Discretionary
240	National School Breakfast and Lunch Program
244	Career and Technical—Basic Grant
255	ESEA, Title II, Part A—Teacher and Principal Training and Recruiting
258	Public Charter Schools
262	Title II, Part D, Subpart 1—Enhancing Education Through Technology
263	Title III, Part A—English Language Acquisition and Language Enhancement
270	ESEA, Title VI, Part B—Rural and Low Income School Program
272	Medicaid Administrative Claiming Program—MAC
393	Texas Successful School Program
397	Advanced Placement Initiatives
401	State-Funded Optional Extended-Year Program
404	Student Success Initiative
410	State Textbook Fund
411	Technology Allotment
413	Telecommunication Infrastructure Fund
415	Kindergarten and Prekindergarten Grants
420	General Fund, Charter
461	Campus Activity Funds
599	Debt Service Funds
865	Student Activity Account
901	General Capital (Fixed) Assets Account Group
902	Long-Term Debt

### Function Codes

11	Instruction
12	Instructional Resources and Media Services
13	Curriculum Development and Instructional Staff Development
21	Instructional Leadership
23	School Leadership
31	Guidance, Counseling and Evaluation Services
32	Social Work Services
33	Health Services
34	Student (Pupil) Transportation
35	Food Services
36	Extracurricular Activities
41	General Administration
51	Facilities Maintenance and Operations
52	Security and Monitoring Services
53	Data Processing Services
61	Community Services
62	School District Administrative Support Services (Used by ESCs Only)
71	Debt Service
81	Facilities Acquisition and Construction
91	Contracted Instructional Services Between Public Schools
92	Incremental Costs Associated with Chapter 41, Texas Education Code, Purchase or Sale of Weighted Average Daily Attendance
93	Payments to Fiscal Agent/Member Districts of SSA

95	Payments to Juvenile Justice Alternative Education Programs
97	Payments to Tax Increment Fund
99	Other Intergovernmental Charges

### Class Object Codes

#### 1000 Assets and Other Debits

1110	Cash and Cash Equivalents
1120	Investments—Current
1210	Property Taxes—Current
1220	Property Taxes—Delinquent
1230	Allowance for Uncollectible Taxes (Credit)
1241	Due from the State
1242	Due from the Federal Agencies
1250	Accrued Interest
1261	General Fund
1262	Special Revenue Fund
1263	Debt Service Fund
1264	Capital Projects Fund
1267	Trust and Agency Funds
1290	Other Receivables
1310	Inventories—Supplies and Materials
1410	Deferred Expenditures/Expenses
1510	Land Purchase and Improvements
1520	Building and Improvements
1531	Vehicles
1539	Furniture and Equipment
1571	Accumulated Depreciation—Buildings
1572	Accumulated Depreciation—Vehicles
1573	Accumulated Depreciation—Furniture and Equipment
1580	Construction in Progress

#### 2000 Liability Accounts

2110	Accounts Payable
2121	Bonds Payable—Current Year
2122	Loans Payable—Current Year
2130	Capital Leases Payable—Current Year
2141	Bond Interest Payable
2142	Loan Interest Payable
2143	Capital Lease Interest Payable
2151	Federal Income Taxes
2152	FICA and Medicare Taxes
2153	Group Health and Life Insurance
2155	Teacher Retirement
2160	Accrued Wages Payable
2171	General Fund
2172	Special Revenue Fund
2173	Debt Service Fund
2174	Capital Projects Fund
2177	Trust and Agency Funds
2181	Due to State
2182	Due to Federal Agencies
2210	Accrued Expenditures/Expenses
2310	Deferred Revenue
2510	Bonds Payable—Long-Term
2520	Loans Payable—Long-Term
2531	Capital Leases Payable—Long-Term

#### 3000 FUND EQUITY/FUND NET ASSETS

3600	Unreserved, Undesignated Fund Balance
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#### 4000 CLEARING ACCOUNTS

## Frequently Used School Accounting Codes

Class Object Codes *continued*

### 5000 REVENUE CONTROL ACCOUNTS

5711	Taxes, Current Year Levy
5712	Taxes, Prior Years
5719	Penalties, Interest and Other Tax Revenues
5742	Earnings from Temporary Deposits and Investments
5744	Revenue from Foundations, Other Non-Profit Organizations, Gifts and Bequests
5749	Other Revenues from Local Sources
5751	Food Service Activity
5752	Athletic Activities
5753	Extracurricular Activities Other Than Athletics
5811	Per Capita Apportionment
5812	Foundation School Program Act Entitlements
5829	State Program Revenue Distributed by TEA
5832	TRS Payment Supplemental Compensation Under Article 3.50-8, Insurance Code
5929	Federal Revenues Distributed by TEA

### 6000 EXPENDITURE ACCOUNTS

6112	Salaries or Wages for Substitute Teachers
6119	Salaries or Wages—Teachers and Other Professional Personnel
6121	Extra Duty Pay/Overtime—Support Personnel
6129	Salaries or Wages for Support Personnel
6132	TRS Supplemental Compensation Under Article 3.50-8, Insurance Code
6139	Employee Allowances
6141	Social Security/Medicare
6142	Group Health and Life Insurance
6143	Workers' Compensation
6144	Teacher Retirement/TRS Care—On-Behalf Payments
6145	Unemployment Compensation
6146	Teacher Retirement/TRS Care
6211	Legal Services
6212	Audit Services
6219	Professional Services/Consultants
6221	Staff Tuition and Related Fees—Higher Education
6223	Student Tuition—Other than Public Schools
6239	Education Service Center Services
6249	Contracted Maintenance and Repair
6259	Utilities
6269	Rentals—Operating Leases (copiers, equipment, etc)
6299	Miscellaneous Contracted Services
6311	Gasoline and Other Fuels for Vehicles, Including Buses
6319	Supplies for Maintenance and/or Operations
6321	Textbooks
6329	Reading Materials (library books, subscriptions, etc.)
6339	Testing Materials
6341	Food
6342	Non-Food (supplies)
6343	Items for Sale (vending)
6344	USDA Commodities
6349	Food Service Supplies
6395	Non-Capital Furniture and Equipment
6399	General Supplies
6411	Travel and Subsistence—Employee Only
6412	Travel and Subsistence—Students
6413	Stipends—Non-Employees

6419	Travel and Subsistence—Non-Employees
6429	Insurance and Bonding Costs
6449	Depreciation Expense
6499	Miscellaneous Operating Costs (awards, fees, dues, etc.)
6511	Bond Principal
6512	Capital Lease Principal
6521	Interest on Bonds
6522	Capital Lease Interest
6619	Land Purchase and Improvement
6629	Building Purchase, Construction, or Improvement
6631	Vehicles (Unit Cost > \$5000)
6639	Furniture, Equipment, Software
6641	Vehicles (Unit Cost \$500-\$4999)
6649	Capital Assets Other Locally Defined Groupings
6669	Library Books and Media

### 7000 OTHER RESOURCES/NON-OPERATING REVENUES

7911	Issuance of Bonds
7912	Sale of Real and Personal Property
7915	Operating Transfers In
7951	Gain in Sale of Real and Personal Property

### 8000 OTHER USES/OPERATING EXPENSES

8911	Operating Transfers Out
8989	Non-Operating Expenses

### Organization Codes

001-040	High School Campuses
041-100	Junior High/Middle School Campuses
101-698	Elementary School Campuses
699	Summer School Organization
701	Superintendent's Office
702	School Board
750	Business Office/Personnel/Payroll/Human Resources/Purchasing (Associated with Function 41—General Administration)
800-997	Locally Defined
999	Undistributed—Organization Unit

### Program Intent Codes

11	Basic Educational Services
21	Gifted and Talented
22	Career and Technical
23	Services to Students with Disabilities (Special Education)
24	Accelerated Education
25	Bilingual Education and Special Language Programs
26	Nondisciplinary AEP
28	Disciplinary AEP—Basic Services (DAEP)
29	Disciplinary AEP—Supplemental (DAEP)
30	Title I, Part A—Schoolwide Activities Related to State Compensatory Education Costs on Campuses with 40% or More Economically Disadvantaged Students
31	High School Allotment
91	Athletics and Related Activities
99	Miscellaneous, Undistributed



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APPENDIX C

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# APPENDIX D

# RETENTION SCHEDULE INDEX

## ADMINISTRATIVE RECORDS SERIES - 1000

1. RECORDS OF GOVERNING BODIES
2. GENERAL RECORDS

## FINANCIAL RECORDS SERIES - 1025

1. FISCAL ADMINISTRATION AND REPORTING
2. ACCOUNTING RECORDS

## PERSONNEL AND PAYROLL RECORDS SERIES - 1050

1. PERSONNEL RECORDS
2. PAYROLL RECORDS

## SUPPORT SERVICES RECORDS SERIES - 1075

1. PURCHASING RECORDS
2. FACILITY, VEHICLE AND EQUIPMENT MANAGEMENT RECORDS

## WORKPLACE SAFETY RECORDS SERIES - 5750

1. BLOODBORN PATHOGEN TRAINING RECORDS
2. WORKPLACE AND FACILITY CHEMICAL LIST
3. HAZARD COMMUNICATION PLANS
4. MATERIAL SAFETY DATA SHEETS

ELECTRONIC DATA PROCESSING RECORDS SERIES - 5800

1. RECORDS OF AUTOMATED APPLICATION
2. COMPUTER OPERATIONS AND TECHNICAL SUPPORT RECORDS

STUDENT ACADEMIC RECORDS SERIES – 3200

FAMILY EDUCATIONAL RIGHTS AND PRIVACY ACT  
RECORDS SERIES - 3225

RECORDS OF SPECIAL POPULATINS AND SERVICES  
SERIES - 3250

1. SPECIAL EDUCATION PROGRAM RECORDS
2. BILINGUAL AND SPECIAL LANGUAGE PJPROGRAM RECORDS
3. GIFTED AND TALENTED PROGRAM RECORDS
4. SECTION 504 PROGRAM RECORDS
5. DYSLEXIA PROGRAM RECORDS
6. MIGRANT STUDENT RECORD TRANSFER SYSTEM RECORDS
7. OTHER SPECIAL POPULATIONS RECORDS

ATTENDANCE RECORDS SERIES - 3275

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ADULT AND VOCATIONAL EDUCATION RECORDS  
SERIES - 3375

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ACCREDITATION RECORDS SERIES - 3425

FOOD SERVICES RECORDS SERIES - 3450

TEXTBOOK RECORDS SERIES - 3475

TRANSPORTATION RECORDS SERIES - 3500

SCHOOL SAFETY RECORDS SERIES - 3525

FINANCIAL RECORDS SERIES - 3550

INDIVIDUAL EMPLOYEE RECORDS SERIES - 3575

1. INDIVIDUAL EMPLOYEE RECORDS
2. STAFFING RECORDS

MISCELLOUS REPORTS AND SURVEYS SERIES - 3600

1. PUBLIC INFORMATION MANAGEMENT SYSTEM SUBMISSIONS

2. SURVEYS, QUESTIONNAIRES AND OPINION POLLS

MISCELLOUS RECORDS SERIES - 3625

1. TEA APPLICATIONS
2. SCHOOL CALENDARS
3. UIL RECORDS
4. EXTRACURRICULAR ACTIVITIES RECORDS
5. STUDENT DRUG AND ALCOHOL TESTING RECORDS
6. PARKING DECALS AND PERMIT RECORDS

LIBRARY RECORDS SERIES – 3650

ABBREVIATIONS USED IN THIS SCHEDULE  
AV – AS LONG AS ADMINISTRATIVELY VALUABLE  
CE – CALENDAR YEAR END  
CFR – CODE OF FEDERAL REGULATIONS  
FE – FISCAL YEAR END  
TAC – TEXAS ADMINISTRATIVE CODE  
US – UNTIL SUSPENDED

**MILES INDEPENDENT SCHOOL DISTRICT  
LOCAL GOVERNMENT RECORDS CONTROL SCHEDULE**

Pursuant to Local Government Code § 203.041  
Texas State Library and Archives Commission  
SLR 520 (2/93)

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Government MILES INDEPENDENT SCHOOL DISTRICT  
 Office (if Applicable) ADMINISTRATION  
 Department (if Applicable) SUPERINTENDENT  
 Address P. O. BOX 308  
MILES, TX Zip 76861 Telephone 325-468-2861  
 Records Management Officer MR. ROBERT GIBSON, SUPERINTENDENT

RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
	ADMINISTRATIVE RECORDS			
1000-01	AGENDAS			
	a) Open meetings:			
	1) If the minutes describe each matter considered by the governing body and reference to an agenda is not required.		2 years.	2 years.
	2) If the minutes do not describe each matter considered by the governing body and reference to an agenda is required.		PERMANENT.	PERMANENT.
	b) Certified agendas of closed meetings.		2 years.	2 years.
1000-02	DEDICATIONS		2 years.	PERMANENT.
1000-03	MINUTES			PERMANENT.
	a) Written minutes.		5 years.	PERMANENT.

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		OFFICE	TOTAL
	b) Notes taken during meeting from which written minutes are prepared.	90 days after approval of minutes by the governing body.	90 days after approval of the minutes by the governing body.
	e) Supporting documentation.		
	One copy of each document of any type submitted to a meeting of a governing body for consideration, approval, or other action: if such action is reflected in the minutes.	2 years.	2 years.
1000-04	OPEN MEETING NOTICES	2 years.	2 years.
1000-05	ORDINANCES, ORDERS, RESOLUTIONS	PERMANENT.	PERMANENT.
1000-06	PETITIONS		
	Petitions from the public to the governing body or subsidiary boards or commissions of a local government.	Final action on the petition + 2 years.	Final action on the petition + 2 years.
1000-07	PROCLAMATIONS	2 years.	2 years.

# MILES INDEPENDENT SCHOOL DISTRICT

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
1000-08	SPEECHES, PAPERS AND PRESENTATIONS Notes or text of speeches, papers, presentations or reports delivered in conjunction with government work by elected officials.	End of term of office or termination of service in that position.		End of term of office or termination of service in that position.
1000-09	CORRESPONDENCE OF ELECTED OFFICIALS AND GOVERNMENTAL BODIES Correspondence sent or received by, or on behalf of, elected and appointed officials, executive staff, and members of governmental bodies as defined by Government Code, Section 551.001(3).	4 years.		4 years.
	GENERAL RECORDS			
	ACCIDENT REPORTS			
1000-20	Reports of accidents to persons on local government property or in any other situation in which a local government could be party to a lawsuit.			
	a) Reports of accidents to adults.	3 years from date of report if no claim is filed; 3 years after settlement or denial of the claim if a claim is filed, whichever applicable.		3 years from date of report if no claim is filed; 3 years after settlement or denial of the claim if a claim is filed, whichever applicable.
	b) Reports of accidents to minors.	Date minor reaches majority age + 3 years, if no claim filed; 3 years after settlement or denial of claim if claim is filed, whichever applicable.		Date minor reaches majority age + 3 years, if no claim filed; 3 years after settlement or denial of claim if claim is filed, whichever applicable.



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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE STORAGE	TOTAL
1000-21	AFFIDAVITS OF PUBLICATION Including any accompanying clipping proofs or tear sheets.		
	b) Notices of election in which candidates for federal office are not involved.	Election day + 22 months.	Election day + 22 months.
	c) All other published legal notices.	2 years.	2 years.
1000-22	ANNEXATION, DISANNEXATION, ABOLITION AND OTHER JURISDICTIONAL RECORDS Records relating to the annexation or disannexation of territory to or from a local government, to its abolition or to other actions which affect its territorial jurisdiction or service area, including reports, correspondence, records of public hearings, agreements and similar records.	PERMANENT.	PERMANENT.
1000-24	COMPLAINTS Complaints received from the public by a governing body or any officer or employee of a local government relating to government policy.	Resolution or dismissal of complaint + 2 years.	Resolution or dismissal of complaint + 2 years.
1000-25	CONTRACTS, LEASES AND AGREEMENTS Contracts, leases and agreements, including reports, correspondence, performance bonds and similar records relating to their negotiation, administration renewal or termination, except construction contracts.	4 years after the expiration or termination of the instrument according to its terms.	4 years after the expiration or termination of the instrument according to its terms.
1000-26	CORRESPONDENCE, INTERNAL MEMORANDA AND SUBJECT FILES		

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE	TOTAL
	a) Administrative incoming / outgoing and internal correspondence pertaining to the formulation, planning, implementation, modification or redefinition of the programs, services or projects of a local government and the administrative regulations, policies and procedures that govern them. May also include subject files, which are collections of correspondence, memos and printed materials on various individuals, activities, topics, policy and program development.	4 years.	4 years.
	b) General – incoming / outgoing and internal correspondence pertaining to the regular and routine operation of the policies, programs, services or projects of a local government. May also include subject files, which are collections of correspondence, memos and printed materials on various individuals, activities and topics.	1 year.	1 year.
	c) Routine correspondence and internal memoranda such as letters of transmittal, requests for publications, internal meeting notices and similar routine matters. May also include subject files, which are collections of correspondence, memos and printed materials on various individuals, activities and topics.	AV with review after 1 year.	AV with review after 1 year.
1000-27	Including title opinions, abstracts and certificates of title, title insurance, documentation concerning alteration or transfer of title, and similar records evidencing public ownership of real property.	PERMANENT.	PERMANENT.
1000-28	Documents relating to easements and rights – of way for local government purposes, including releases.	PERMANENT.	PERMANENT.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE	TOTAL
1000-29	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 policies.  LEGAL OPINIONS	4 years after expiration or termination of the policy according to its terms.	4 years after expiration or termination of the policy according to its terms.
1000-30	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.	Resolution + 1 year.	PERMANENT.
1000-31	LITIGATION CASE FILES  Including all cases to which a local government is a party unless the case file is of a type noted elsewhere in this or other commission schedules.	AV after decision of a local government not to file a lawsuit or decision that a lawsuit will not be filed against it; dismissal of a lawsuit for want of prosecution or on motion of the plaintiff; or final decision of a court (or of a court of appeal, if applicable) in a lawsuit.	AV after decision of a local government not to file a lawsuit or decision that a lawsuit will not be filed against it; dismissal of a lawsuit for want of prosecution or on motion of the plaintiff; or final decision of a court (or of a court of appeal, if applicable) in a lawsuit.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		TOTAL
		OFFICE	STORAGE	
1000-32	MINUTES OF STAFF MEETINGS PUBLIC RELATIONS RECORDS	AV with review after 1 year.		(or count of appeal, if applicable) in a lawsuit. AV with review after 1 year.
1000-33	News, press releases or any public relations files maintained or issued by an agency. Includes print, electronic, audio and audiovisual records. PUBLIC INFORMATION ACT REQUEST	2 years.		2 years.
1000-34	Includes all correspondence and documentation relating to request for records under the Public Information Act. a) Non-exempted records. b) Exempted records.	Data request for records fulfilled + 1 year. Date of notification that records requested are exempt from disclosure + 2 years.		Date request for records fulfilled + 1 year. Date of notification that records requested are exempt from disclosure + 2 years.
1000-35	ORGANIZATIONAL CHARTS PHOTOGRAPHS, IMAGES, RECORDINGS AND OTHER NON-TEXTUAL MEDIA	US.		US.
1000-37	Photographs, photographic scrapbooks, slides, sound recordings, videotapes, posters and other non-textual media that document the history and activities of a local government or any of its departments, programs or projects except such records noted elsewhere in this or other commission schedules.	AV. with review after 1 year.		AV with review after 1 year.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
1000-38	POLICY AND PROCEDURE DOCUMENTATION Executive orders, directives, manuals and similar documents that establish and define the policies, procedures, rules and regulations governing the operations or activities of a local government as a whole or any of its departments, programs, services or projects. PUBLICATIONS	US, expired, or discontinued + 5 years.		US, expired or discontinued + 5 years.
1000-39	Pamphlets, reports, studies, proposals and similar material printed by or for a local government 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.	PERMANENT, one copy of each.		PERMANENT, one copy of each.
1000-40	RECORDS MANAGEMENT RECORDS			
	a) Records control schedules (including all successive versions of and amendments to schedules).	US.		US.
	b) Records documenting the destruction of records under records control schedules, including request submitted to the Texas State Library and Archives Commission for authorization to destroy unscheduled records or the originals of permanent records that have been microfilmed.	2 years.	PERMANENT.	PERMANENT.
	c) RECORDS INVENTORY Lists or inventories of the active and inactive records created or received by a local government.	US, expired or discontinued.		US, expired or discontinued.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
1000-41	d) RECORDS MANAGEMENT PLANS Plans and similar documents establishing the policies and procedures under which a records management program operates, including records protection and disaster and preparedness recovery plans.  REPORTS AND STUDIES (NON - FISCAL )	US, expired or discontinued + 5 years.		US, expired or discontinued + 5 years.
	a) Annual, sub-annual, or irregularly prepared reports, performance audits, or planning studies submitted to the governing body or chief administrative officer of a local government or by the local government 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.			
	1) Annual reports.	3 years.	PERMANENT.	PERMANENT.
	2) Special reports or studies prepared by order or request of the governing body or considered by the governing body or ordered or requested by a state agency.	3 years.	PERMANENT.	PERMANENT.
	3) Special reports or studies prepared by order or request of the chief administrative officer.	5 years.		5 years.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE	TOTAL
	4) Monthly, quarterly or semi - annual reports.	3 years.	3 years.
	5) Working papers used to create any report for (1) and (2) above.	3 years.	3 years.
	6) Working papers used to create any report for (3) and (4) above.	1 year.	1 year.
	b) Activity reports compiled on a daily or other periodic basis pertaining to workload, time studies, number of public contacts, ect.	1 year.	1 year.
	WAIVER OF LIABILITY		
1000-42	Including statements signed by volunteers acknowledging non - entitlement to benefits, agreeing to abide by local government policies. (ect).	3 years from date of cessation of activity for which the waiver was signed.	3 years from date of cessation of activity for which waiver was signed.
1000-43	CONFLICTS DISCLOSURE STATEMENTS AND CONFLICT OF INTEREST QUESTIONNAIRES	Date of filing + 3 years.	Date of filing + 3 years.
1000-44	LOCAL GOVERNMENT OFFICERS, LISTS OF	US + 1 year.	US + 1 year.
1000-45	CALENDARS APPOINTMENT AND ITINERARY RECORDS	CE + 1 year.	CE + 1 year.
	INSURANCE CLAIMS		
1000-46	Claims related to liability, theft, fire, health, life, automobile and other insurance policies.	Settlement or denial of claim + 3 years.	Settlement or denial of claim + 3 years.
1000-47	CUSTOMER SURVEYS	Issuance of report on results of the survey + 3 years.	Issuance of report on results of the survey + 3 years.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
1000-50	TRANSITORY INFORMATION Records of temporary usefulness that are not an integral part of a records series of a local government, that are not regularly filed within a local government's recordkeeping system, and that are required only for a limited time.	AV with review after 1 year.		AV with review after 1 year.
	FINANCIAL RECORDS			
	FISCAL ADMINISTRATION AND REPORTING RECORDS			
	FISCAL AUDIT RECORDS Including both internal and external auditors.			
	Audit reports:			
	a) Annual, biennial or other periodic audit of any department, fund, account or activity of a local government.	3 years.		PERMANENT.
	b) Annual, biennial, or other periodic audit of a department, program, fund, or account if included in the cumulative audit under (a).	2 years.		PERMANENT.
	c) Annual, biennial, or other periodic audit of a department, program, fund, or account if not included in a cumulative audit under (a).	1 year.		PERMANENT.
1025-01				



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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE	TOTAL
	d) Special audits ordered by a governing body, court, grand jury, or mandated by administrative rules of a state or federal agency.	1 year.	PERMANENT.
	e) Working papers, summaries, and similar records created for the purpose of conducting an audit.	3 years after all questions arising from the audit have been resolved.	PERMANENT.
1025-02	BANK SECURITY RECORDS Records documenting the pledging of bonds or securities by banks serving as depositories for public funds including depository contracts, security pledges and statements; surety bonds and similar records.	4 years after termination, expiration, or release of contractual obligations.	4 years after termination, expiration, or release of contractual obligations.
1025-03	BOND RECORDS		
	a) Bond administrative records consisting of preliminary studies, proposals and prospectuses, authorizations and certifications for issuance or cancellation, and related policy correspondence.	3 years.	PERMANENT.
	b) Bond certificates and redeemed coupons.	1 year after payment.	1 year after payment.
	c) Bond registers.	3 years.	PERMANENT.
	d) Records relating to the exchange, conversion or replacement of bonds by bondholders.	1 year if information is contained in a bond register; PERMANENT if information is not contained in a bond register.	1 year if information is contained in a bond register; PERMANENT if information is not contained in a bond register.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
1025-04	BUDGETS AND BUDGET DOCUMENTATION			
	a) Annual budgets including amendments.	3 years.	PERMANENT.	PERMANENT.
	b) Special budgets (includes budgets for capital improvement projects, grant – funded projects or other projects prepared on a special or emergency basis and not included in an annual budget).	3 years.	PERMANENT.	PERMANENT.
	c) Working papers created exclusively for the preparation of budgets, including budget requests, justification statements, and similar documents.	2 years.		2 years.
	d) Encumbrance and expenditure reports.	2 years.		2 years.
	e) Budget change documentation, including line item or contingency/reserve fund transfers and supplemental budget requests.	2 years.		2 years.
1025-05	CAPITAL ASSETS RECORDS			
	a) Equipment or property history cards or similar records containing data on initial cost, including disposal authorizations when disposed of.	FE date of disposal + 5 years.		FE date of disposal + 5 years.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE	TOTAL
	b) Equipment or property cost and depreciation schedules or summaries used for capital outlay budgeting or other financial or budget control purposes.	FE + 5 years.	FE + 5 years.
	c) Equipment or property inventories.	US + 3 years.	US + 3 years.
	d) Property sale, auction or disposal records of government - owned equipment or property.	1 year.	1 year.
	<b>FEDERAL REVENUE SHARING RECORDS</b>		
1025-06	Records concerning the use of federal revenue sharing funds by a local government, including revenue and expenditure summaries, status, budget and audit reports; and other reports or documentation required by federal law or regulation.	5 years.	5 years.
	<b>FINANCIAL REPORTS</b>		
1025-07	Annual, sub-annual, or irregularly prepared financial reports or statements on the accounts, funds, or projects of a local government created 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.		
	a) Monthly, bimonthly, quarterly, or semi-annual reports.	FE + 3 years.	FE + 3 years.
	b) Annual reports.	3 years.	PERMANENT.
	c) Long range fiscal planning reports.	3 years.	PERMANENT.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE	TOTAL
	d) Capital improvement reports.	3 years.	PERMANENT.
1025-08	GRANT DEVELOPMENT AND ADMINISTRATIVE RECORDS		
	a) Successful grant applications and proposals and any document that modifies the terms of a grant.	FE + 5 years.	PERMANENT.
	b) Financial, performance, and compliance reports submitted to grantor or sub-grantor agencies.	FE + 5 years.	PERMANENT.
	c) Reports, planning memoranda, studies, correspondence, and similar records created for and used in the development of successful grant proposals.	3 years.	3 years.
	d) Any records of the type noted in (a) or (b) relating to successful grant proposals.	AV with review after 1 year.	AV with review after 1 year.
1025-09	INVESTMENT TRANSACTION RECORDS		
	a) Documentation relating to the investment of public funds, that evidences the investment of public funds, the performance or return of investments, the cancellation or withdrawal of investments and similar activity.	FE + 5 years.	PERMANENT.
	b) Documentation related to the calculation of arbitrage rebate amounts, if any, on proceeds from the sale of tax - exempt bonds.	Retirement of the last obligation of the bond issue + 6 years.	Retirement of the last obligation of the bond issue + 6 years.
1025-10	CHARGE SCHEDULES / PRICE LIST	US + 3 years.	US + 3 years.
	Schedules of prices charged by local government for services to the public or other governments, including any documentation used to determine the charges.		

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
	ACCOUNTING RECORDS			
1025-25	Accounting policies and procedures directives and similar records documenting accounting methodology.	US, expired or discontinued + 5 years.		US, expired or discontinued + 5 years.
1025-26	ACCOUNTS PAYABLE AND DISBURSEMENT RECORDS a) 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 reimbursement to employees for travel and other employee-related expense. b) Accounts payable records sufficient to document the purchase cost of capital equipment or other fixed assets. c) Fund transmittal reports accompanying the transmittal of funds to federal, state, or other local government agencies, except those accompanying the transmittal of federal and state payroll and unemployment taxes. d) Accounts payable records for bond-funded projects	FE date of payment + 2 years.  FE date of disposal + 2 years.  FE of period covered + 2 years.  FE of date of last bond payment + 2 years.	3 years.  3 years.  3 years.	FE date of payment + 5 years.  FE date of disposal + 5 years.  FE of period covered + 5 years.  FE date of last bond payment + 5 years.
1025-27	ACCOUNTS RECEIVABLE RECORDS a) Records documenting receipt of monies owed to or received by a local government and its collection or receipt.	FE date of receipt + 2 years.	3 years.	FE date of receipt + 5 years.

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		OFFICE	STORAGE	TOTAL
	e) Records of accounts deemed uncollectible, including write - off authorizations.	FE date of write-off + 2 years.	3 years.	FE date of write-off + 5 years.
1025-28	BANKING RECORDS Bank statements, canceled checks, check registers, deposit slips, debit and credit notices, reconciliations and notices of interest earned, ect. COST ALLOCATIONS AND DISTRIBUTION RECORDS	FE +2 years.	3 years.	FE + 5 years.
1025-29	Records created to document the allocation of cost among accounts and funds of a local government, including records relating to charge - backs and other interdepartmental or inter - fund accounting transactions.	FE +2 years.	3 years.	FE + 5 years.
1025-30	LEDGERS, JOURNALS AND ENTRY DOCUMENTATION a) General ledger showing receipts and expenditures from all accounts and funds of a local government. 1) For fiscal years for which an annual audit report exists.	FE + 2 years.	3 years.	FE + 5 years.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
	2) For fiscal years for which an annual audit report does not exist.	PERMANENT.		PERMANENT.
	b) Subsidiary ledgers.	FE + 2 years.	3 years.	FE + 5 years.
	c) Receipt, disbursement, general, or subsidiary journals.	FE +2 years.	3 years.	FE + 5 years.
	d) Journal vouchers and entries or similar posting control forms ( including supporting documentation such as correspondence and auditor adjustments that evidence journal entries and amendments )	FE + 2 years.	3 years.	FE + 5 years.
1025-31	TRANSACTION SUMMARIES			
	a) Daily.	30 days.		30 days.
	b) Weekly.	90 days.		90 days.
	c) Monthly.	2 years.		2 years.
	d) Annual.	FE + 2 years.		FE + 5 years.
1025-32	UNCLAIMED PROPERTY DOCUMENTATION	Date on which property is reportable + 3 years.	7 years.	Date on which property is reportable + 10 years.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
	PERSONNEL AND PAYROLL RECORDS			
1050-01	AFFIRMATIVE ACTION PLANS			
	a) Reports, analyses and statistical data compiled from source documentation used to develop, implement and monitor affirmative action plans.	5 years.		5 years.
	b) Affirmative action plans.	US + 5 years.		US + 5 years.
	APTITUDE AND SKILL TESTS RECORDS			
1050-02	Records relating to aptitude or skills test required of job applicants or of current personnel to qualify for promotion or transfer.			
	a) Validation studies.	Life of test + 2 years.		Life of test + 2 years.
	b) Tests	US + 2 years.		US + 2 years.
	c) Test papers of persons taking tests.	2 years.		2 years.
	d) Records, other than those (noted (a) - (c)), relating to planning or administration of test.	3 years.		3 years.



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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
1050-03	AWARDS AND COMMENDATIONS CERTIFICATION AND LICENSES	Date of separation + 5 years.		Date of separation + 5 years.
1050-04	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.		US or separation of employee + 5 years.
1050-05	CONFLICT OF INTEREST AFFIDAVITS	5 years after leaving position for which the affidavit was filed.		5 years after leaving the position for which the affidavit was filed.
1050-06	COUNSELING PROGRAM RECORDS			
	a) 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.	3 years after termination of counseling.		3 years after termination of counseling.
	b) Records relating to the planning, coordination, implementation, direction and evaluation of employee counseling program.	3 years.		3 years.
1050-07	DISCIPLINARY AND ADVERSE ACTION RECORDS			
	(c) All other local governments' employees ( School Districts).	2 years after case closed or action taken, as applicable.		2 years after case closed or action taken, as applicable.
1050-08	EMPLOYEE PENSION AND BENEFITS RECORDS			

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE	TOTAL
	a) Employee benefits plans such as pension, life, health and disability insurance; seniority and merit systems; and deferred compensation plans, including amendments.	Termination of plan + 4 years.	Termination of plan + 4 years.
	b) Enrollment forms providing personal identifying data, beneficiary information, option selection and similar information.		
	1) If official record is maintained by the retirement system.	A V with review after 1 year.	A V with review after 1 year.
	2) If official record is maintained by the local government.		
	a) Pension and deferred compensation.	Date of separation + 75 years.	Date of separation + 75 years.
	b) Life, health, accidental death and disability insurance.	Termination of coverage + 4 years.	Termination of coverage + 4 years.
	c) Annual reports from a pension system or fund.	PERMANENT.	PERMANENT.
1050-09	EMPLOYEE RECOGNITION RECORDS	Date of separation +5 years.	Date of separation + 5 years.
1050-10	EMPLOYEE SECURITY RECORDS		
	a) 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 separation + 2 years, as applicable.	US, date of expiration, or separation + 2 years, as applicable.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
	b) Records relating to the issuance of parking permits.	US.		US.
1050-11	EMPLOYEE SELECTION RECORDS	2 years from the creation (or receipt) of the record or the personnel action involved, whichever later.		2 years from the receipt of the record or the personnel action involved, whichever later.
1050-12	EMPLOYEE SERVICE RECORD	Date of separation + 1 year.	74 years.	75 years.
1050-13	EMPLOYEE ADVERTISEMENTS OR ANNOUNCEMENTS	2 years.		2 years.
1050-14	EMPLOYEE APPLICATIONS	2 years from the receipt of the record or the personnel action involved, whichever later.		2 years from the receipt of the record or the personnel action involved, whichever later.
	a) Samples of publications, artwork, or other products of prior achievement not returned to applicants.	AV with review after 2 years.		AV with review after 2 years.
	b) Transcripts of persons hired if state or federal law or regulation mandates a level of education needed to qualify for employment.	Date of separation + 5 years.		Date of separation + 5 years.
	c) Resume.	2 years.		2 years.
1050-15	EMPLOYMENT CONTRACT / COLLECTIVE BARGAINING RECORDS			

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
	a) 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. b) Records relating to 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.		Last effective date of contract + 4 years.
1050-16	EQUAL EMPLOYMENT OPPORTUNITY RECORDS AND REPORTS			
	a) Reports, analyses, or statistical data compiled from source documentation used to complete EEO reports. b) EEO-1, EEO-4, EEO-5, and EEO-6 reports.	3 years.		3 years.
	c) Case files relating to discrimination complaints, including complaints, legal and investigative documents, exhibits, related correspondence, withdrawal notices, and decisions or judgments. EQUAL PAY RECORDS	Resolution of case + 3 years.		Resolution of case + 3 years.
1050-17	Reports, studies, aggregated or summarized data and similar documentation compiled to monitor and demonstrate compliance with the Equal Pay Act.	2 years.		2 years.
1050-18	FIDELITY BONDS	Effective life of bond + 5 years.		Effective life of bond + 5 years.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
1050-19	FINGERPRINT CARDS		Date of separation + 5 years.	Date of separation + 5 years.
1050-20	GRIEVANCE RECORDS Records relating to the review of employee grievances against personnel policies, working conditions, ect.		2 years.	2 years.
1050-21	PERFORMANCE APPRAISALS Job evaluations of local government employees.		US + 2 years; or date of separation + 2 years, whichever is applicable.	US + 2 years; or date of separation + 2 years, whichever is applicable.
1050-22	MEDICAL AND EXPOSURE REPORTS a) Health, physical or psychological examination reports or certificates of all job applicants if physical or psychological condition is a factor in hiring, promotion, transfer, or selection for training of current personnel.		2 years.	2 years.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
	b) Health or physical examination reports or certificates of employees for whom periodic monitoring of health or fitness is required.			
	1) For employees exposed in the course of their work to toxic substances, harmful physical agents or blood borne pathogens.	Date of separation + 30 years.		Date of separation + 30 years.
	2) For all other employees.	US + 2 years.		US + 2 years.
	c) Environmental, biological, and material safety monitoring reports concerning toxic substances and harmful physical agents in the workplace, including analyses derived from such reports.	30 years.	30 years.	30 years.
	d) Records of controlled substances and alcohol use and testing.			
	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 test; driver evaluation and referrals; calibration documentation; records related to the administration of the alcohol and controlled substances testing programs; copy of each annual calendar year summary required by 49 CFR .382.401.	5 years.		5 years.
	2) Records related to the alcohol and controlled substance collection process.	2 years.		2 years.
	3) Records of negative and canceled controlled substances test results and alcohol test results with a concentration of less than 0.02.	1 year.		1 year.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
1050-23	OATHS OF OFFICE  PERSONNEL ACTION OR INFORMATION NOTICES	US + 5 years or 5 years after leaving position for which oath required, whichever is applicable.		US + 5 years or 5 years after leaving position for which oath required, whichever is applicable.
1050-24	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 the part.  PERSONNEL STUDIES AND SURVEYS	2 years.		2 years.
1050-25	Studies, statistical reports, surveys, cost analyses and projections and similar records, except those noted elsewhere in the part, on any aspect of the personnel management or administration of a local government.  POSITION DESCRIPTION, CLASSIFICATION AND STAFF MONITORING RECORDS	3 years.		3 years.
1050-26	a) 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; ect.  b) Position staffing and vacancy reports.  c) Personnel requisitions.	US or until position abolished + 4 years.  US.  2 years.		US or until position abolished + 4 years.  US.  2 years.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE STORAGE	TOTAL
1050-27	REDUCTION IN FORCE PLANS ( including any related implementation documentation )	US or if implemented 2 years from date of last reduction in force action under the plan.	US or if implemented 2 years from date of last reduction in force action under the plan.
1050-28	TRAINING AND EDUCATIONAL ACHIEVEMENT RECORDS		
	a) 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 or health care professionals), in other governments or the private sector.	Date of separation + 5 years.	Date of separation + 5 years.
	b) Records documenting the planning, development, implementation, administration, and evaluation of in-house training programs.	2 years.	2 years.



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		OFFICE	TOTAL
	c) Training manuals, syllabuses, course outlines, and similar training aids used with in-house training programs.	US, expired or discontinued + 2 years.	US, expired or discontinued + 2 years.
	d) Skill or achievement measurement records of a training group or class as a whole (e.g., rosters with scores).	2 years.	2 years.
1050-29	UNEMPLOYMENT COMPENSATION CLAIMS RECORDS	After closed +5 years.	After closed +5 years.
1050-30	VERIFICATION OF EMPLOYMENT ELIGIBILITY	3 years from hire or 1 year after separation, whichever later.	3 years from hire or 1 year after separation, whichever later.
1050-31	WORK SCHEDULES Except work schedules includable in item number GR1050-56. WORKERS COMPENSATION CLAIM RECORDS	1 year.	1 year.
1050-32	Initial and supplemental reports of accidents to or job - related illnesses of employees and documentation relating to any subsequent filing of claims by employees. FINANCIAL DISCLOSURE STATEMENTS	CE of closure of claim + 5 years.	CE of closure of claim + 5 years.
1050-33	Financial disclosure statements of officers and / or employees of a local government.	2 years.	2 years.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE	TOTAL
1050-34	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.	US.	US.
1050-35	EMPLOYEE EXIT INTERVIEWS	Date of separation + 2 years.	Date of separation + 2 years.
1050-36	CRIMINAL HISTORY CHECKS	End of employee's probationary period or after immediate purpose has been fulfilled, as applicable.	End of employee's probationary period or after immediate purpose has been fulfilled, as applicable.
1050-37	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.	US or date of separation + 2 years, as applicable.
1050-38	UNSOLICITED RESUMES	AV with review after 1 year.	AV with review after 1 year.
1050-39	VOLUNTEER SERVICE FILES Information about individual volunteers and duties they perform. PAYROLL RECORDS	US or date of separation + 3 years.	US or date of separation + 3 years.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
1050-50	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.		4 years after separation or 4 years after amendment, expiration, or termination of authorization, whichever sooner.
1050-51	DIRECT DEPOSIT APPLICATIONS / AUTHORIZATIONS	US or date of separation, as applicable.		US or date of separation, as applicable.
1050-52	EARNINGS AND DEDUCTION RECORDS			
	a) Any of the following records containing the following payroll information on each employee: name, last known address and social security number, amount of wages paid for each payroll period, including all deductions, and date of payment will satisfy the retention requirement.			
	1) Individual employee earnings card or record that shows earnings and deductions for each pay period.	2 years.	3 years.	5 years.
	2) Master payroll register which shows earnings and deductions for each pay period.	2 years.	3 years.	5 years.
	b) MASTER PAYROLL RECORD The retention of any one of the following will satisfy the retention requirement.	75 years		75 years
	1) Individual employee earnings card or record as in (a) (1)	3 years.	72 years.	75 years.

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		OFFICE	STORAGE	TOTAL
	2) Employee Service Record if it contains the prescribed pension and deferred compensation deduction data.	3 years.	72 years.	75 years.
	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 were made.	3 years.	72 years.	75 years.
	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.	3 years.	72 years.	75 years.
	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 of period.	3 years.	72 years.	75 years.
	c) Master payroll register, including year-to-date registers, if not used to satisfy either of the retention requirements set in (a) or (b).	2 years.	3 years.	5 years.
	d) Subsidiary payroll registers, if not used to satisfy either of the retention requirements set in (a) or (b).			
	1) If data contained in the subsidiary payroll register is not contained in the master payroll register.	2 years.	3 years.	5 years.
	2) If data is contained in the subsidiary payroll register is contained in the master payroll register.	AV with review after 1 year.		AV with review after 1 year.
	e) Copies of annual or 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.		2 years.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
	f) Payroll adjustment record.	FE + 2 years.	3 years.	FE + 5 years.
1050-53	FEDERAL AND STATE TAX FORMS			
	a) Forms used to determine withholding from wages and salaries for payroll tax purposes.	4 years after separation or 4 years after form amended, whichever sooner.		4 years after separation or 4 years after form amended, whichever sooner.
	b) Forms and reports used to report the collection, distribution, deposit, and transmittal of payroll unemployment taxes.	4 years after tax due date or date tax paid, whichever later.		4 years after tax due date or date tax paid, whichever later.
1050-54	LEAVE RECORDS			
	a) 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 (2) accumulated sick leave is creditable to an employee that is rehired. The retention of one of the following will satisfy the retentions requirement.			
	1) Individual employee earnings card or record as described in item number GR 1050-52a if it also contains accumulated sick leave data.	Date of separation + 3 years.	72 years.	Date of separation + 75 years.
	2) Employee Service Record if it contains the accumulated sick leave data prescribed.	Date of separation + 3 years.	72 years.	Date of separation + 75 years.
	3) Copy of the final time summary or leave status report, as noted in (d), of each separated employee.	Date of separation + 3 years	72 years.	Date of separation + 75 years.

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		OFFICE	STORAGE	TOTAL
	b) Request and authorizations for vacation, compensatory, sick, Family and Medical Leave Act and other types of authorized leave and supporting documentation.	FE + 5 years.		FE + 5 years.
	c) Leave or hours-to-date register	FE + 5 years.		FE + 5 years.
	d) 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 in (a).	2 years.		2 years.
	PAYROLL ACTION OR INFORMATION NOTICES			
1050-55	Documents used by payroll officers to create or change information in the payroll records of individual employees except deduction authorizations and federal tax forms.			
	a) Documents concerning hiring, termination, transfer, pay grade, position or job title, name changes, ect.	2 years.		2 years.
	b) Documents concerning adjustments to payroll and leave status.	FE + 3 years.		FE + 3 years.
	TIME AND ATTENDANCE REPORTS			
1050-56	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.		4 years.
	TIME CHANGE RECORDS			
1050-57	Request and authorizations for overtime, time trading and other actions that affect normal work time except leave request.	2 years.		2 years.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
1050-58	REIMBURSABLE ACTIVITIES, REQUEST AND AUTHORIZATIONS TO ENGAGE IN	FE + 2 years.	3 years.	Fe + 5 years.
1050-59	WAGE AND SALARY RATE TABLES			
	a) If wage or salary rate for each position listed on Employee Service Record is expressed in dollars.	2 years after last effective date.		2 years after last effective date.
	b) If wage or salary rate for each position listed on an Employee Service Record is indicated by grade or step number only.	Date of separation +3 years.	72 years.	Date of separation + 75 years.
	SUPPORT SERVICES			
	PURCHASING RECORDS			
1075-01	BIDS AND DOCUMENTATION			
	a) Successful bids and requests for proposals, including invitations to bid, bid bonds and affidavits, bid sheets and similar supporting documentation.	FE year of award + 2 years.	3 years.	FE year of award + 5 years.
	b) Unsuccessful bids.	2 years.		2 years.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
	c) Request for informal bids estimates, quotes or responses from providers for the procurement of goods or services for which state law or local policy does not require the formal letting of bids.	1 year.		1 year.
	d) Request for information (rfi) preliminary to the procurement of goods or services by direct purchase or bid.	AV after date of direct purchase, issuance of request for bids or decision not to proceed with the procurement, as applicable.		AV after date of direct purchase, issuance of request for bids or decision not to proceed with the procurement, as applicable.
1075-02	INVENTORY RECORDS (parts and supplies)	1 year.		1 year.
1075-03	PURCHASE ORDERS AND RECEIPT RECORDS			
	a) Purchase orders, requisitions and receiving reports.	FE + 2 years.	3 years.	FE + 5 years.
	b) Purchasing logs, register or similar record providing a chronological record of purchase orders issued, orders received and similar data on procurement status.	FE + 2 years.	3 years.	FE + 5 years.
	c) Packing slips and order acknowledgements.	AV with review after 1 year.		AV with review after 1 year.
	d) Vendor and commodity lists.	US.		US.
	FACILITY, VEHICLE, AND EQUIPMENT MANAGEMENT RECORDS			



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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
1075-15	ACCIDENT AND DAMAGE REPORTS. (PROPERTY)	3 years.		3 years.
1075-16	CONSTRUCTION PROJECT RECORDS  a) records concerning the design, construction, 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 results; environmental impact statements; construction contracts and bonds; correspondence; and similar documentation.  b) Records of types described in (a) relating to the construction of prefabricated storage sheds, bus shelters, parking lots kiosks, non-structural recreational facilities such as baseball diamonds and tennis courts, and similar structures and facilities.  c) Records relating to construction projects described in (a and b) that are transitory or of ephemeral relevance. Such as rejected design plans delivery tickets for expendable products, daily work reports, etc.	PERMANENT.		PERMANENT.
1075-17	LOST AND STOLEN PROPERTY REPORTS	Completion of project + 10 years.		Completion of project + 10 years.
1075-18	MAINTENANCE, REPAIR AND INSPECTION RECORDS	5 years.		5 years.
		FE + 3 years.		FE + 3 years.
	a) Vehicles and equipment.			
	1) Routine inspection records.	1 year.		1 year.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
	2) Maintenance and repair records.	L.A.		L.A.
	b) Facilities.			
	1) Routine cleaning, janitorial and inspection work.	1 year.		1 year.
	2) All other facility maintenance, repair and inspection records (including those relating to plumbing, electrical, fire suppression and other infrastructural systems).	5 years.		5 years.
1075-19	SERVICE REQUEST / WORK ORDERS	2 years.		2 years.
1075-20	USAGE REPORTS			
	Reports of usage of facilities, vehicles and equipment			
	a) Any type of usage report (mileage, fuel consumption, copies run) if such reports are the basis for allocating cost, for determining payment under rental or lease agreements, ect.	FE + 2 years.	3 years.	FE + 5 years.
	b) Reservation logs or similar records relating to the use of facilities such as meeting rooms, auditoriums ect. By the public or other governmental agencies.	2 years.		2 years.
	c) Usage reports compiled for purposes other than those noted in (a) or (b).	1 year.		1 year.
1075-21	VEHICLE OR EQUIPMENT ASSIGNMENT RECORDS			
	Assignment logs, authorization and similar records relating to the assignment and use of government - owned vehicles or equipment by employees.	After return or reassignment + 2 years.		After return or reassignment + 2 years.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
1075-22	VISITOR CONTROL REGISTERS Logs, registers or similar records documenting visitors to limited access or restricted areas.			
1075-23	WARRANTIES For vehicles and equipment.	3 years.		3 years.
1075-24	VEHICLE TITLES AND REGISTRATION	Expiration of warranty + 1 year.		Expiration of warranty + 1 year.
1075-25	SURVEILLANCE VIDEOS Surveillance videos for, but not limited to, security of property and persons.	LA.		LA.
		AV.		AV.
	COMMUNICATIONS RECORDS			
1075-40	POSTAL AND DELIVERY SERVICE RECORDS			
	a) Meter and permit usage records.			
	b) Registered, certified, insured and special delivery mail receipts and similar records of transmittal by express or delivery companies.	1 year.		1 year.
1075-41	TELEPHONE LOGS OR ACTIVITY REPORTS	1 year.		1 year.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
	a) If the log, report or similar record is used for cost allocation purposes.	FE + 2 years.	3 years.	FE + 5 years.
	b) If the log, report or similar record is used for internal control purposes other than cost allocation.	1 year.		1 year.
	c) Internal telephone directory of local government employees, directory may include personal contact information with their home phone number or other contact information. E-RATE RECORDS	US, expired or discontinued.		US, expired or discontinued.
1075-42	All records related to the application for, receipt and delivery of discounted telecommunications and other supported services.	FE + 5 years.		FE + 5 years.
	WORKPLACE SAFETY RECORDS			
	BLOOD BORNE PATHOGEN TRAINING RECORDS			
5750-01	Records of training given to employees with exposure to blood borne pathogens showing the dates of training sessions, contents or summaries of the sessions, names and job titles of those who received training and names and qualifications of instructors.	3 years.		3 years.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
5750-02	FACILITY CHEMICAL LIST Copies of tier two forms containing information of hazardous chemicals present in local government facilities submitted to the fire chief of the fire department having jurisdiction over the facilities and to the Texas Department of State Health Services as required by Health and Safety Code. HAZARD COMMUNICATION PLANS	30 years.		30 years.
5750-03	Plans describing how criteria of the Hazard Communications Act with regard to the education and training of employees will be met. HAZARDOUS MATERIALS TRAINING RECORDS	US + 5 years.		US + 5 years.
5750-04	Records of training given to employees in a hazard communications program showing the date of each training session, subjects covered during the session, rosters of employees who attended and names of instructors.	5 years.		5 years.
5750-05	MATERIAL DATA SAFETY SHEETS WORKPLACE CHEMICAL LISTS	AV after receipt of updated sheet or the hazardous chemical is no longer present in the local government, as applicable.		AV after receipt of updated sheet or the hazardous chemical is no longer present in the local government, as applicable.
5750-06	Lists of hazardous chemicals, including superseded list, compiled and maintained by local governments in accordance with the Health and Safety Code.	30 years.		30 years.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE	TOTAL
	INFORMATION TECHNOLOGY RECORDS		
	AUDIT TRAIL RECORDS		
5800-01	Files needed for electronic data audits such as files or reports showing transactions accepted, rejected, suspended and / or processed; history files / tapes; records of on-line updates to application files or security logs.	Until audit requirements met.	Until audit requirements met.
5800-02	FINDING AIDS, INDEXES AND TRACKING SYSTEMS Automated indexes, lists, registers and other finding aids used to provide access to the hard copy and electronic records.	Until the related hard copy or electronic records have been destroyed.	Until the related hard copy or electronic records have been destroyed.
5800-03	HARDWARE DOCUMENTATION Records documenting operational and maintenance requirements of computer hardware such as operating manuals, hardware / operating system requirements, hardware configurations and equipment control systems.	Until electronic records are transferred to and made usable in a new hardware environment or there are no electronic records being retained to meet an approved retention period.	Until electronic records are transferred to and made usable in a new hardware environment or there are no electronic records being retained to meet an approved retention period.
5800-04	MASTER FILE RECORDS Relatively long - lived computer files containing organized and consistent sets of complete accurate electronic records.	Until completion of 3 <sup>rd</sup> system backup cycle except as outlined in (a) (b) or (c).	Until completion of 3 <sup>rd</sup> system backup cycle except as outlined in (a) (b) or (c).

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE	TOTAL
	a) Electronic file which replaces or serves in lieu of a textual record.	Same as equivalent textual record.	Same as equivalent textual record.
	b) Electronic file containing fiscal information, for an equivalent textual record exists, but which is also subject to audit.	Dispose of after all audit questions have been resolved.	Dispose of after all audit questions have been resolved.
	c) Output data file extracted from system solely to distribute data to individuals or program units for reference use or to produce printed reports or other publications.	Dispose of after data is distributed or when no longer needed to create publication.	Dispose of after data is distributed or when no longer needed to create publication.
	<b>PROCESSING RECORDS</b>		
5800-05	Electronic files used to produce a master file, including, but not limited to, work files, maintenance and test files, print files and intermediate input / output records.		
	a) Routine or benchmark file used to test system performance.	AV.	AV.
	b) File which facilitates processing of a particular job or system run, but which does not add to, delete from or substantially modify information in a master file.	AV.	AV.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
5800-06	SOFTWARE PROGRAMS  Automated software applications and operating system files including job control language, program listing / source code etc.	Until electronic records are transferred to and made usable in a new software environment or there are no electronic records being retained to meet an approved retention period that require the software to be retrieved and read.	Until electronic records are transferred to and made usable in a new software environment or there are no electronic records being retained to meet an approved retention period that require the software to be retrieved and read.	
5800-07	SOURCE DOCUMENTS FOR ELECTRONIC RECORDS  a) For documents with an approved retention of 10 years or more.	The source document may be destroyed, kept or returned to the person who filed it after the creation of the electronic record if an electronic storage authorization has been approved based on certification of compliance with the Standards and Procedures for Electronic Records of Local Governments (13 TAC Chapter 7.		



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	b) For records with an approved retention of less than 10 years.	The source document may be destroyed prior to the expiration of the retention period for the source document in a records retention schedule issued by the commission if the magnetic tape, disk or similar medium and hardware and software necessary to provide access to local government record data on the medium are retained for the retention period given in the schedule.		
5800-08	TECHNICAL DOCUMENTATION	Until electronic records are transferred to and made usable in a new hardware or software environment with new documentation or there are no electronic records being retained to meet an approved retention period that require the documentation to be retrieved and read.		
	COMPUTER OPERATIONS AND TECHNICAL SUPPORT RECORDS			

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
5825-01	ACCESS SECURITY RECORDS Records created for security purposes to control or monitor individual access to a system and its data, including but not limited to user account records, security login information and password files.		Retain until all audit or legal requirements have been met.	
5825-02	BATCH DATA ENTRY CONTROL RECORDS Forms and logs used to reconcile batches submitted for processing against batches received and processed.		A/V after reconciliation confirmed.	
5825-03	CHARGEBACK RECORDS TO DATA PROCESSING SERVICES USERS Records used to document, calculate costs and bill program units for computer usage and data processing services. These records are also used for cost recovery, budgeting or administrative purposes.	FE + 3 years.	4 years.	FE + 7 years.
5825-04	COMPUTER JOB SCHEDULES AND REPORTS DATA PROCESSING POLICIES AND PROCEDURES	90 days.		90 days.
5825-05	Records of data processing policies and procedures including those covering access and security, systems development, data retention and disposition and data ownership (records of procedures for data entry, operation of computer equipment, production control, system backup, compliance with electronic records rules, ect ) DATA PROCESSING PLANNING RECORDS	US, expired or discontinued + 5 years.		US, expired or discontinued + 5 years.
5825-06	Reports, studies, analyses, projections and similar records concerning the creation, development or modification of data processing systems and services except for disaster recovery plans.	5 years.		5 years.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
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5825-07	NETWORK SYSTEMS DISASTER PREPAREDNESS AND RECOVERY PLANS Records related to the protection and reestablishment of data processing services and equipment in case of a disaster. ELECTRONIC MEDIA LIBRARY SYSTEM RECORDS	US. Until related records or media are destroyed or withdrawn from the library.	US. Until related records or media are destroyed or withdrawn from the library.
5825-08	Records used to control the location, maintenance and disposition of media in an electronic media library except for destruction documentation that is maintained permanently. INPUT DOCUMENTS	Until all data has been entered into the system and, if required, verified.	Until all data has been entered into the system and, if required, verified.
5825-09	Copies of records or forms designed and used solely for data input and control when the data processing unit provides centralized data input services and original records are maintained by the program unit except for data entry documents noted elsewhere in this schedule or other schedules adopted by the commission. NETWORK CIRCUITS INVENTORIES	US. US.	US. US.
5825-10	Records containing information on network circuits used by the government including circuit number, vendor, type of connection, terminal series, software, contact person and other relevant information about the circuit. NETWORK IMPLEMENTATION RECORDS	US. US.	US. US.
5825-11	Records used to implement a computer network including reports, diagrams of network and wiring schematics. OPERATING SYSTEM AND HARDWARE CONVERSION PLANS	1 year after completion of conversion.	1 year after completion of conversion.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE	TOTAL
5825-13	OUTPUT RECORDS FOR COMPUTER PRODUCTION QUALITY ASSURANCE RECORDS	AV.	AV.
5825-14	Information verifying the quality of system, hardware or software operation including records of errors or failures and the loss of data resulting from such failure, documentation of abnormal termination and of error free processing, checks of changes put into production, transaction histories and other records needed as an audit trail to evaluate data accuracy. PROJECT RECORDS	Until no longer needed as an audit trail for records modified.	Until no longer needed as an audit trail for records modified.
5825-15	Records created and used in the development, redesign or modification of automated systems or application. a) Project management records, design documentation, feasibility studies, justifications, user requirements, etc. b) Routine status reports, memos and correspondence.	3 years after completion of project.	3 years after completion of project.
5825-16	SYSTEM ACTIVITY MONITORING RECORDS Electronic files or automated logs created to monitor computer systems such as print spool logs, console logs, tape activity logs, ect. ELECTRONIC TRAINING RECORDS	AV.	AV.
5825-17	Memoranda, Flyers, Catalogues, registration forms, rosters and other records documenting training courses provided users of electronic records systems.		

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Department (if Applicable) SUPERINTENDENT  
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Records Management Officer MR. ROBERT GIBSON, SUPERINTENDENT

RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
	1) If the training is required to hold or to continue to hold a specific position or if the training is required of all employees. 2) If the training is not required to hold or to continue to hold a specific position or if the training is not required of all employees.			
5825-18	INTERNET COOKIES Data resident on hard drives that make use of user - specific information transmitted by the Web server onto the user's computer so that the information might be available for later access by itself or other servers.	AV.	4 years.	AV.
5825-19	HISTORY FILES - WEB SITES A record of the documents visited during an Internet session that allows users to access previously visited pages more quickly or to generate a record of a user's progress.	AV.		AV.
5825-20	SOFTWARE REGISTRATIONS, WARRANTIES AND LICENSE AGREEMENTS	LA + 3 years.		LA + 3 years.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE	TOTAL
	STUDENT ACADEMIC RECORDS		
3200-01	ACADEMIC RECORDS		
	a) The academic achievement record or its equivalent used to record academic achievement in grades 9 through 12.	Date of graduation + 1 year.	PERMANENT.
	b) Cumulative record of achievement in grades Pre-K through 8 <sup>th</sup> grade.	Date of withdrawal or pass to high school + 2 years.	3 years.
3200-02	BIRTH DATE DOCUMENTATION		
	a) Copies of birth certificates, church records, bible records, passport or immigration records, passports, or other documents to establish date of birth.	Date of withdrawal or graduation + 2 years.	3 years.
3200-03	CUSTODY DOCUMENTS	Until student is 18 years old.	
	Copies of court instruments relating to adoption, guardianship or custody.		Until student is 18 years old.
3200-04	ENROLLMENT OR REGISTRATION FORM	Date of withdrawal or graduation + 2 years.	3 years.
3200-05	HOME LANGUAGE SURVEYS	Date of withdrawal or graduation + 2 years.	3 years.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
3200-06	MISSING CHILD PREVENTION AND IDENTIFICATION PROGRAM RECORDS			
	a) Fingerprint cards.	US or date of withdrawal.		US or date of withdrawal.
	b) Photographs.	US, or 5 years, whichever sooner.		US, or 5 years, whichever sooner.
	c) Parental consents.	1 year after fingerprints and / or photograph taken.		1 year after fingerprints and / or photograph taken.
	PARENTAL PERMISSION RECORDS			
3200-07	Parental consents for a student to engage in school activities or programs, except consents noted elsewhere in this schedule.	Until cessation of activity + 2 years; or if annually renewable, US + 2 years.		Until cessation of activity + 2 years; or if annually renewable, US + 2 years.
3200-08	STUDENT WITHDRAWAL RECORD / TRANSFER FORM	2 years.	3 years.	5 years.
3200-09	TEST AND ACADEMIC MEASUREMENT REPORTS			
	a) Results of TAAAS, TEAMS, TABS, STAAR and other standardized state and national achievement, mental abilities and aptitude test reported by score, percentile rank, ect.	1 year after recording of data in the academic achievement or cumulative record.		1 year after recording data in the academic achievement or cumulative record.
	b) Reports of results of other tests or measurements (e.g. reading / mathematics profiles).	Date of withdrawal + 2 years.	3 years.	Date of withdrawal + 5 years.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE	TOTAL
	e) District summaries on a group basis of the results of standardized testing.	3 years.	3 years.
3200-10	ETHNICITY FORMS Student and Staff Ethnicity and Race Data Questionnaire.	3 years or until litigation, claim, or audit is complete, whichever is later.	3 years or until litigation, claim, or audit is complete, whichever is later.
3200-11	STATEMENTS OF ASSURANCE FOR STUDENTS WHO ARE VICTIMS OF A VIOLENT CRIMINAL ACT School Safety Choice Option Transfer Policy Statement of Assurance includes date the incident occurred, incident number, identity of perpetrator, if known, ect.	5 years.	5 years.
	FAMILY EDUCATIONAL RIGHTS AND PRIVACY ACT RECORDS		
	ACCESS POLICIES		
3225-01	Written polices and procedures demonstrating how a district meets Family Educational Rights and Privacy Act of 1974, as amended, and federal rules adopted under the act.	US.	US.
3225-02	ACCESS TO INFORMATION, RECORDS OF		



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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE	TOTAL
	a) Documentation of requests from and disclosures to the parent or eligible student, to an official of the district for what the district has determined are legitimate, educational interests, to a party with written consent from the parent or eligible student, or to a party seeking directory information.	2 years.	2 years.
	b) Documentation of request from and disclosures to any party not included in (a).	2 years.	PERMANENT.
	c) Written consents from parent of eligible student for information disclosure.		
	1) From the parent.	Until student is 18.	Until student is 18.
	2) From the eligible student.	Date of graduation + 2 years.	PERMANENT.
	d) Written refusal from parent or eligible student to the disclosure of directory information.		
	1) If refusals are valid as long as the student is in attendance.	AV after date of withdrawal with review after + 1 year.	AV after date of withdrawal with review after + 1 year.
	2) If refusals must be renewed each academic year.	US or AV after withdrawal, as applicable.	US or AV after withdrawal, as applicable.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE	TOTAL
3225-03	PROTEST OF RECORDS STATEMENT  Statements from parent or eligible students commenting on contested information in a student record, or stating why they disagree with a district's decision not to amend a record, or both.	For as long as the record containing the contested information is maintained.	For as long as the record containing the contested information is maintained.
3225-04	RECORD AMENDMENT REQUEST AND RELATED DOCUMENTATION  Request from parents or eligible student to amend student records, notices by the district of denial or consent to amendments, requests for hearings on denied request, hearing notices and written decisions by hearing examiners.	2 years.	2 years.
	RECORDS OF SPECIAL POPULATIONS AND SERVICES		
	SPECIAL EDUCATION PROGRAM RECORDS		
3250-01	ENROLLMENT LISTS AND ROSTERS	5 years.	5 years.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
3250-02	STUDENT RECORDS Records of each student referred to or receiving special education services, including referral, assessment and reevaluation reports; enrollment and eligibility forms; admission, review and dismissal (ARD) and transitional planning committee documentation; individual educational plans (IEP) and individual transitional plans (ITP); parental consent forms for testing and placement; and other records of services required under federal and state regulation.	Cessation of service + 5 years.		Cessation of service + 5 years.
	BILINGUAL AND SPECIAL LANGUAGE PROGRAM RECORDS			
	STUDENT RECORDS Records of each student referred to or receiving bilingual or special language services, including recommendations from parents or teachers for bilingual instruction, student interview documentation, notifications to parents, parental consent or denials, language proficiency assessment committee reports, exit reports, follow-up study reports and other records of services required by state regulation or pertinent to the identification of students for bilingual education or special language programs.	Cessation of service + 5 years.		Cessation of service + 5 years.
3250-08	GIFTED AND TALENTED PROGRAM RECORDS			

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
3250-16	STUDENT RECORDS Records of each student referred to or receiving services in a gifted / talented program, including nomination and observation documentation, testing results, parental consents, committee reports and recommendations and other records of services required under state regulation or pertinent to the identification of students for participation in gifted / talented programs.	Cessation of service + 5 years.		Cessation of service + 5 years.
	SECTION 504 PROGRAM RECORDS			
	STUDENT RECORDS			
3250-20	Records of each student referred to or receiving services under Section 504, including referral, pre - placement and reevaluation reports, parental notices; group and impartial hearing deliberations; and other records of services under Section 504.	Cessation of service + 5 years.		Cessation of service + 5 years.
	DYSLEXIA PROGRAM RECORDS			
3250-26	ENROLLMENT RECORDS	Cessation of service + 5 years.		Cessation of service + 5 years.
	STUDENT RECORDS			
3250-27	Records of each student referred to or receiving dyslexia program services, including referral and assessment reports; group deliberations; parental notices; and other records of services required under state regulation.	Cessation of service + 5 years.		Cessation of service + 5 years.
	MIGRANT STUDENT RECORD TRANSFER SYSTEM RECORDS			

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE	TOTAL
3250-33	DAILY MRST LOGS	5 years.	5 years.
3250-34	ENROLLMENT AND WITHDRAWAL RECORDS MONITORING DOCUMENTATION	5 years.	5 years.
3250-35	Summaries of eligibility verifications and validations, parent / guardian questionnaires, copies of validated certificates of eligibility and copies of any correspondence from a school district to a regional educational service center requesting deletion of ineligible children from the MSRTS. RECRUITING RECORDS	5 years.	5 years.
3250-36	Recruiter logs, questionnaires and similar records documenting efforts of recruiters to identify and enroll currently and formerly migrant students.	5 years.	5 years.
3250-37	STUDENT RECORDS		
	a) Certificates of eligibility.	End of eligibility + 5 years.	End of eligibility + 5 years.
	b) Copies of most current educational and health records or forms providing educational and health updates, information from which is transmittable to regional educational service centers for data entry.	US.	US.
	c) Data verification reports from MSRTS center.	AV with review after 1 year.	AV with review after 1 year.
	OTHER SPECIAL POPULATIONS RECORDS		

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE STORAGE	TOTAL
3250-43	FEDERAL IMPACT AID SURVEY FORMS Locally designed form used to survey parents to determine eligibility for federal impact aid under P.L. 81 - 874. a) Survey forms of students determined to be eligible and used to complete district application for school assistance in federally affected areas.	5 years.	5 years.
	b) Survey forms of students determined not to be eligible.	AV with review after 1 year.	AV with review after 1 year.
	MCKINNEY HOMELESS ASSISTANCE ACT STUDENT RECORDS	5 years.	5 years.
	ATTENDANCE RECORDS		
3275-01	ATTENDANCE CONTROL DOCUMENTATION		

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE	TOTAL
	a) Correspondence to and from parents or guardians concerning absence and tardiness.	AV with review after 1 year.	AV with review after 1 year.
	b) Correspondence with law enforcement or other agencies concerning violations of the compulsory school attendance law, including all associated documentation.	2 years.	2 years.
	c) Attendance officer's logs and reports of parents or guardians visited.	5 years.	5 years.
	d) Documents relating to student attendance hearings and appeals.	Date of decision + 5 years.	Date of decision + 5 years.
3275-02	ATTENDANCE REPORTS		
	a) Attendance and enrollment reports submitted to TEA, including those term and period reports submitted to the superintendent by principals for the purposes of compiling state - mandated reports.	5 years.	5 years.
	b) Daily registers of Pupil Attendance (or an equivalent locally - designed record) and similar daily or periodic reports used to document the attendance and absence of students.	5 years.	5 years.
	SCHOLASTIC CENSUS RECORDS		
3275-03	Scholastic census cards or rolls of school age children residing in the county or district created from 1905 through 1969.	PERMANENT.	PERMANENT.
	TRANSFER, APPLICATIONS FOR AND ASSOCIATED REPORTS		
3275-04	Documentation concerning the transfer and enrollment of students in districts other than those in which they are a resident.	5 years.	5 years.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE	TOTAL
	STUDENT HEALTH RECORDS		
3300-01	ACCIDENT REPORTS Reports of accidents to students. ACTIVITY AND STATISTICAL REPORTS	5 years; or 2 years after the student reaches the age of 18, whichever later.	5 years; or 2 years after the student reaches the age of 18, whichever later.
3300-02	Daily and other periodic activity and statistical reports, except those noted elsewhere in this section, compiled by school nurses or nurse extenders relating to student health matters.	3 years.	3 years.
3300-03	CORRESPONDENCE WITH PARENTS OR GUARDIANS	2 years.	2 years.
3300-04	CUMULATIVE HEALTH CARD	Date of withdrawal or graduation +5 years.	Date of withdrawal or graduation + 5 years.
3300-05	EMERGENCY CARDS	US or end of enrollment, whichever sooner.	US or end of enrollment, whichever sooner.



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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
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3300-06	EXCLUSION AND VERIFICATION DOCUMENTS Affidavits or similar documents seeking the exclusion of students from participation in immunization or other health care programs for medical or religious reasons or verifications of previous illness or health testing.		
	a) Exclusion documentation.		
	1) Affidavits of medical contraindications.	1 year or date of withdrawal + 2 years if contraindication is lifelong.	1 year or date of withdrawal + 2 years if contraindication is lifelong.
	2) Affidavits of religious conflicts.	Date of withdrawal + 2 years.	Date of withdrawal + 2 years.
	b) Verifications of mumps and measles illness.	Date of withdrawal + 2 years.	Date of withdrawal + 2 years.
	c) Verifications from physicians or health care agencies of prior testing of sight, hearing and spinal curvature.	Date of withdrawal + 2 years.	Date of withdrawal + 2 years.
3300-07	HEALTH SCREENING DOCUMENTATION		
	a) Worksheets, checklist, examination forms and similar documentation used in student health screening.	1 year after entry on Cumulative Health Record.	1 year after entry on Cumulative Health Record.
	b) Vision, hearing and spinal curvature reports submitted to Texas Department of State Health Services.	2 years.	2 years.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
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3300-08	IMMUNIZATION RECORDS		
	a) Immunization record (either separate or in combination with cumulative health card as in item number 3300-04).	Date of withdrawal + 5 years.	Date of withdrawal + 5 years.
	b) Annual report of immunization status.	3 years.	3 years.
3300-09	PHYSICIANS REFERRALS AND REPORTS		
	Copies of referrals to physicians, including any attached screening worksheets and reports from physicians on referred health matters.	1 year after entry on Cumulative Health Record.	1 year after entry on Cumulative Health Record.
	REPORTS TO ENFORCEMENT AGENCIES		
3300-10	Copies of reports on child abuse or neglect, communicable disease, dog bites, drug offenses, missing children or sexual transmitted disease submitted to the Texas Department of State Health Services, the Texas Health and Human Services Commission, or local law enforcement and animal control agencies.	2 years.	2 years.
3300-11	SPECIAL HEALTH CARE RECORDS		
	a) Logs or reports of medications or treatment administered to students on a group or individual basis.	3 years.	3 years.
	b) Parents request and physician's authorizations for specialized health care.	End of validity of request or authorization + 2 years.	End of validity of request or authorization + 2 years.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
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	INSTRUCTION AND GRADE REPORTING RECORDS		
3325-01	CURRICULUM GUIDES	US. 1 year after entry of grades in the academic achievement or cumulative record.	US. 1 year after entry of grades in the academic achievement or cumulative record.
3325-02	GRADE BOOKS		
3325-03	GRADE REPORTS	1 year after entry of grades in the academic achievement record.	1 year after entry of grades in the academic achievement record.
3325-04	LESSON PLANS REPORT CARDS	1 year.	1 year.
3325-05	Copies of report cards or grade reports or a comparable record evidencing the grades that have been reported for a student to the student's parents.	1 year after entry of grades in the academic achievement or cumulative record.	1 year after entry of grades in the academic achievement or cumulative record.
	DISCIPLINE AND COUNSELING RECORDS		

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
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3350-01	DISCIPLINE RECORDS			
	a) Records relating to removal to a Disciplinary Alternative Education Program, suspension or expulsion.	1 year.	4 years.	5 years.
	b) Records relating to forms of discipline other than removal to a Disciplinary Alternative Education Program, suspension or expulsion.	A V with review after 4 years.		A V with review after 4 years.
3350-02	STUDENT GUIDANCE AND COUNSELING FILES			
	Individual student counseling files maintained by school counselors, including parental conference reports.	A V with review after 1 year.		A V with review after 1 year.
3350-03	LAW ENFORCEMENT NOTIFICATIONS			
	Notification from a law enforcement agency of the arrest of a student enrolled in a public primary or secondary school in accordance with Code of Criminal Procedure.	End of school year.		End of school year.
	ADULT AND VOCATIONAL EDUCATION RECORDS			

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3375-01	CLASS ORGANIZATION REPORTS AND ROSTERS	5 years.	5 years.
3375-02	CURRICULUM PLANNING DOCUMENTATION Project and study plans developed by instructors in vocational education, including those for vocational summer work	5 years.	5 years.
3375-03	FOLLOW - UP REPORTS Reports on post-instructional experience of leavers and completers of vocational education programs. STUDENT RECORDS	5 years.	5 years.
3375-04	Cooperative training plans; applications for participation in work study programs; student rating forms; progress reports and record cards; individual follow-up records; and similar records of assignments to and the completion by a student of vocational education projects and tasks.	End of enrollment + 5 years.	End of enrollment + 5 years.
	DRIVERS EDUCATION RECORDS		

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3400-01	STUDENT RECORDS	5 years.	5 years.
3400-02	Individual records of students enrolled in diver's education. STUDENT ROSTERS	5 years.	5 years.
3400-03	INSTRUCTIONAL CHECKLISTS	1 year after entry of scores and other data in student individual record or roster.	1 year after entry of scores and other data in student individual record or roster.
3400-04	LICENSING AND COMPLETION FORMS		
3400-04	Any copies of forms or certificates maintained in student files relating to applications for drivers licenses, course completion, insurance discount forms and notices of cancellation.	AV with review after 1 year.	AV with review after 1 year.
3400-05	REQUEST FOR RECOGNITION OF COMPLETION DOCUMENTS	AV with review after 1 year.	AV with review after 1 year.
	ACCREDITATION REPORTS		
	ACCREDITATION REPORTS		
3425-01	ACCREDITATION REPORTS		

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 Office (if Applicable) ADMINISTRATION  
 Department (if Applicable) SUPERINTENDENT  
 Address P.O. BOX 308  
 City MILES, TX Zip 76861 Telephone 325-468-2861  
 Records Management Officer MR. ROBERT GIBSON, SUPERINTENDENT

RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE	TOTAL
	a) Reports to TEA on accreditation planning or the self-monitoring of progress toward the achievement of goals.	AV with subsequent accreditation with review after 2 years.	AV with subsequent accreditation with review after 2 years.
	b) Accreditation investigative reports from the TEA to the board of trustees of a school district.	3 years.	PERMANENT.
3425-02	PLANNING RECORDS Self studies; planning documents used to establish goals and indicators; achievement reports; documents evidencing parent, community and staff involvement in the establishment of performance objectives; and similar records created in school districts to plan for and monitor progress during interims between accreditation visits.	AV with subsequent accreditation with review after 2 years.	AV with subsequent accreditation with review after 2 years.
	FOOD SERVICE RECORDS		
	CERTIFICATES OF AUTHORITY		
3450-01	Authorizations for persons to act on behalf of a school district in school lunch matters.	Us + 5 years.	US + 5 years.
	DAILY FOOD SERVICE RECORDS		
3450-02	Daily record of full - price, reduced price and free breakfast and lunches served.	FE + 5 years.	FE + 5 years.
	FOOD AND FOOD EQUIPMENT INVENTORY RECORDS		
3450-03		FE + 5 years.	FE + 5 years.
	FREE OR REDUCED-PRICE MEAL RECORDS		
3450-04			

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE	TOTAL
	a) Applications from parents for free or reduced -price breakfast or lunches.	FE + 5 years.	FE + 5 years.
	b) Rosters or lists of eligible students.	FE +5 years.	FE + 5 years.
	c) Policy statements on free and reduced - price meals.	US + 5 years.	US + 5 years.
3450-05	HEALTH INSPECTION REPORTS	5 years.	5 years.
3450-06	MENU RECORDS		
	a) Menu planning records.	5 years.	5 years.
	b) Daily menus.	5 years.	5 years.
	TEXTBOOK RECORDS		
3475-01	ANNUAL MEMBERSHIP REPORT	FE + 2 years.	FE + 2 years.



# MILES INDEPENDENT SCHOOL DISTRICT

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE STORAGE	TOTAL
3475-02	LOCAL TEXTBOOK COMMITTEE REPORT	US.	US.
3475-03	TEXTBOOK CUSTODIAN BONDS	US + 2 years.	US + 2 years.
3475-04	TEXTBOOK INVENTORY AND DISTRIBUTION CONTROL RECORDS		
	a) Inventories.	US + 2 years.	US + 2 years.
	b) Book cards or records comparable in function documenting what books were distributed to each student and similar records documenting their return or non - return.	FE + 2 years.	FE + 2 years.
	c) Records documenting the distribution, transfer and return of textbooks on a campus by campus basis.	FE + 2 years.	FE + 2 years.
	d) Reports on state owned textbooks that have been destroyed.	FE + 2 years.	FE + 2 years.
3475-05	TEXTBOOKS PROCUREMENT RECORDS		
	a) Requisitions and supplemental requisitions for textbooks, learning systems and related material, including those for visually disabled students, placed with the TEA, the Texas Instructional Materials Center for the Visually Impaired, or other vendors as may be permitted by law or regulation, including supporting documentation such as statements of charges, packing slips, freight bills and shipment - error reports.	FE + 2 years.	FE + 2 years.
	b) Order notifications from the TEA concerning processing of textbook orders.	2 years after receipt and reconciliation of shipment.	2 years after receipt and reconciliation of shipment.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE STORAGE	TOTAL
3475-06	c) Documentation relating to the procurement of sample textbook, learning systems and related materials.  TEXTBOOK SALES AND DISPOSITION RECORDS  a) State textbook sales invoices and acknowledgment statements, logs (district and campus) of textbooks paid for, payment or reduced payment waivers, payment account cards, and any district forms used for transmittal of textbook funds from campuses to the textbook coordinator.  b) Records relating to disposition by donation or destruction of expiring or out-of-adoption textbooks.	2 years.	2 years.
	SCHOOL TRANSPORTATION RECORDS		
3500-01	APPLICATION FOR NEW TRANSPORTATION PROGRAMS		
	Requests to the TEA for approval of state funds for eligible pupil transportation services.	FE + 5 years.	
	CONTRACTS FOR TRANSPORTATION SERVICES		
3500-02	Contracts with public or commercial companies for pupil transportation services, including copies of applications to the TEA for contract approval.	Date of expiration or termination of the contract according to its terms + 4 years.	Date of expiration or termination of the contract according to its terms + 4 years.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
3500-03	DRIVERS RECORDS			
	a) Medical examination reports.	US + 3 years.		US + 3 years.
	b) School bus driver training certification verifications.	3 years.		3 years.
	c) Drivers license record checks.	US or date of separation + 2 years, as applicable.		US or date of separation + 2 years, as applicable.
	ELIGIBLE RIDER DOCUMENTATION			
3500-04	Documentation, maintained in the form of lists of actual bus riders by name and route number, including all associated records providing source information needed to complete ridership sections of state-required pupil transportation reports.	3 years.		3 years.
	PUPIL TRANSPORTATION REPORTS			
3500-05	Annual reports to the TEA on the number of pupils transported by school bus or private means (including route mileage), used by the agency to determine transportation allotments.	3 years.		3 years.
	ROUTE DESCRIPTIONS			
3500-06	A turn-by-turn accounting for each approved route, specifying road designations and corresponding mileages.	US + 3 years.		US + 3 years.
3500-07	SCHOOL TRANSPORTATION COST AND MAINTENANCE RECORDS			

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE	TOTAL
	a) Vehicle master record containing the following: complete description of the vehicle, including vehicle identification and license numbers; annual beginning and ending odometer readings; total annual fuel, maintenance, labor and parts costs; and complete maintenance history (in summary form showing date and nature of service, repair or state inspection).	L.A.	L.A.
	b) Service request / work orders.	2 years.	2 years.
	c) Daily activity reports compiled by vehicle shop personnel and / or drivers showing fuel and oil consumption, odometer readings, routine inspections, etc., from which data is derived for operating cost reports and the vehicle master record.	2 years.	2 years.
	d) School bus usage reports for extracurricular activities, field trips or private purposed under contract needed for compiling annual operating costs reports under (e).	FE + 2 years.	FE + 2 years.
	e) Annual operation cost reports submitted to the TEA.	Fe + 5 years.	Fe + 5 years.
3500-08	SCHOOL BUS PURCHASE REQUISITIONS	Fe + 5 years.	Fe + 5 years.
3500-09	SCHOOL BUS SURVEILLANCE VIDEO		
	a) Video recorded where no incident occurs.	AV.	AV.
	b) Video that records an incident.	30 days after incident resolved or verdict is rendered.	30 days after incident resolved or verdict is rendered.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE	TOTAL
	SCHOOL SAFETY RECORDS		
3525-01	EVACUATION AND FIRE EXIT PLANS	US.	US.
	FIRE DRILL RECORDS		
3525-02	Records of fire drill, including schedules, reports and correspondence with fire departments, and associated documentation.	3 years.	3 years.
3525-03	FIRE SAFETY INSPECTION REPORTS	3 years.	3 years.
	FINANCIAL RECORDS		
	AGENCY FUND ACCOUNTING RECORDS		
3520-01	Any accounts payable, accounts receivable or ledgers and journals used to document the receipt and expenditure of local agency funds from clearing accounts that are custodial in nature.	FE + 3 years.	FE + 3 years.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE	TOTAL
3550-02	COUNTY AVAILABLE FUNDS	FE + 3 years.	FE + 3 years.
3550-03	SCHOOL BONDS, APPLICATIONS FOR GUARANTY OF	Until receipt of guaranty documentation.	Until receipt of guaranty documentation.
	INDIVIDUAL EMPLOYEE RECORDS		
	ABSENCE FROM DUTY REPORTS	4 years.	4 years.
3575-01	APPLICATIONS AND RECOMMENDATIONS FOR PROFESSIONAL OR PARAPROFESSIONAL CERTIFICATES OR PERMITS, COPIES OF		
3575-02	Copies of applications / recommendations endorsed by the superintendent or other authorized school official and forwarded by the district or the applicant to the TEA for the purposes of certification or review of qualifications.		
	a) Application for Nonrenewable Permit:	1 year.	1 year.
	b) All others:	A V with review after 1 year.	A V with review after 1 year.
3575-03	AUDIT VERIFICATION CARDS	US, then upon date of separation then most current must be retained PERMANENTLY.	US, then upon date of separation then most current must be retained PERMANENTLY.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE	TOTAL
3575-04	DEFICIENCY PLAN	US by a teaching certificate, or separation of employee + 5 years, as applicable.	US by a teaching certificate, or separation of employee + 5 years, as applicable.
3575-05	PERFORMANCE APPRAISAL RECORDS		
	a) Appraisal record (including documentation by the teacher).	Date of separation + 3 years.	PERMANENT.
	b) Observation / evaluation forms (including documentation submitted by the teacher).	Date teacher signs for receipt of appraisal record + 4 years.	Date teacher signs for receipt of appraisal record + 4 years.
	c) Notes taken by appraisers during observation or similar written documentation created by the teacher's supervisor that, in combination with the formal observation, is used to determine credit for the criteria and indicators on the observation / evaluation forms.	Date teacher signs for receipt of observation / evaluation form + 1 year.	Date teacher signs for receipt of observation / evaluation form + 1 year.
	d) Teacher assessment of instructional goals and outcomes.	AV with review after 1 year.	AV with review after 1 year.
	e) Professional growth plans.	4 years.	4 years.
	f) Grievance and response documents.	Date of separation + 5 years.	PERMANENT.
	SERVICE RECORD AFFIDAVITS	Date of separation + 5 years.	PERMANENT.
3575-06	Affidavits attached to teacher service record claiming months served prior to the 1949 - 50 school years.	Date of separation + 5 years.	PERMANENT.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE	TOTAL
3575-07	STATEMENTS OF COMMITMENT (OUT-OF-STATE CERTIFICATES)	Until receipt by district of Texas certification or date of separation + 5 years, as applicable.	Until receipt by district of Texas certification or date of separation + 5 years, as applicable.
3575-08	STATEMENTS OF INTENTION TO BECOME A UNITED STATES CITIZEN	AV with review after 1 year.	AV with review after 1 year.
3575-09	TEACHER CERTIFICATE REGISTERS	PERMANENT.	PERMANENT.
3575-10	TUBERCULOSIS CERTIFICATES	AV with review after 2 years.	AV with review after 2 years.
3575-11	CRIMINAL HISTORY CHECKS	1 year for date obtained or after information is used for the authorized purpose, whichever sooner.	1 year from date obtained or after information is used for the authorized purpose, whichever sooner.
	STAFFING RECORDS		
	PERSONNEL ROSTERS		
3575-16	Including those detailing assignments to grades, courses, ect.	3 years.	3 years.





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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
	MISCELLANEOUS REPORTS AND SURVEYS			
3600-01	PUBLIC INFORMATION MANAGEMENT SYSTEM DATA SUBMISSIONS	1 year.	4 years.	5 years.
3600-02	DATA VERIFICATION REPORTS Data printouts or reports from TEA or other agencies provided for informational purposes showing data received and entered in TEA or other agency databases and similar documents seeking confirmation of the accuracy of current data information. SURVEYS	AV with review after 1 year.		AV with review after 1 year.
3600-03	Surveys, questionnaires, opinion polls, and similar documents received from the TEA or other agencies, completed and returned by the superintendent or other school official, and used by the surveying agency for the preparation of needs assessments or statistical reports and not for the specific purpose of monitoring compliance with a required or grant - funded program in the respondent district.	AV with review after 1 year.		AV with review after 1 year.
	MISCELLANEOUS RECORDS			

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE	TOTAL
3623-01	PROGRAM APPROVAL APPLICATIONS Applications and supporting documentation for local programs that must be approved by the TEA before implementation but which do not involve the allocation of state or federal funds controlled by the agency.		
	a) Applications approved.	US + 5 years or life of program + 5 years, whichever applicable.	US + 5 or life of program + 5 years, whichever applicable.
	b) Applications not approved.	AV with review after 1 year.	AV with review after 1 year.
3623-02	REQUEST FOR WAIVER OF TEA AGENCY POLICIES AND RULES Request and renewals of request for waivers of TEA policies and rules, including any attached documentation.		
	a) Request granted.	5 years.	5 years.
	b) Request not granted.	AV with review after 1 year.	AV with review after 1 year.
3623-03	SCHOOL CALENDAR UNIVERSITY INTERSCHOLASTIC LEAGUE RECORDS	US + 2 years.	US + 2 years.
3623-04	Correspondence, schedules, rosters, reports, records of participation and similar documentation, except financial records (see local schedule GR), concerning the participation of a district in academic, music and athletic contests and programs governed by the University Interscholastic League.	2 years.	2 years.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD	
		OFFICE	STORAGE
		TOTAL	
3625-05	EXTRACURRICULAR ACTIVITY RECORDS Application, selection, and evaluation records for participation in extracurricular activities.	2 years.	2 years.
3625-06	STUDENT DRUG / ALCOHOL TEST RESULTS		
	a) Negative results.	1 year.	1 year.
	b) Positive results or refusal form.	Date of withdrawal, graduation, or 5 years, whichever sooner.	Date of withdrawal, graduation, or 5 years, whichever sooner.
3625-07	VISITOR LOGS	2 years.	2 years.
3625-08	PARKING DECAL / PERMIT RECORDS	US or expiration of permit.	US or expiration of permit.
	LIBRARY RECORDS		
	ACCESSION / DEACCESSION RECORDS		
3650-01	Records used to update library catalogs or inventory records of the accession through purchase of gift or the deaccession through loss or withdrawal of library and museum materials.	1 year.	1 year.

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RECORD NUMBER	RECORD TITLE	RETENTION PERIOD		
		OFFICE	STORAGE	TOTAL
3650-02	BORROWER REGISTRATION RECORDS Records documenting the registration of borrowers.	1 year.	1 year.	1 year.
3650-03	CIRCULATION RECORDS Records documenting the circulation of library materials through individual borrowers.	1 year.	1 year.	1 year.
3650-04	INTERLIBRARY LOAN RECORDS Records relating to the lending and borrowing of library materials through interlibrary loan.	1 year.	1 year.	1 year.
3650-05	INVENTORY RECORDS Shelf lists or equivalent records showing current library and museum holdings.	US.	US.	US.
3650-06	LIBRARY CATALOGS	US.	US.	US.

# APPENDIX E



# Miles I. S. D.

P. O. Box 308 Miles, Texas 76861 325-468-2861 Fax 325-468-2179

**Robert  
Gibson**

Superintendent

{DATE}

**Jamie  
Rouse**

HS Principal

TO WHOM IT MAY CONCERN:

**Sharla  
Arp**

Elem Principal

I hereby certify that I have utilized 100% of my time in the implementation of the {PROGRAM NAME} program activities as required during the period of {DATE FOR BEGINNING AND END OF SEMESTER}.

**Board  
Members**

**Cary  
Houston**

Board President

\_\_\_\_\_  
{EMPLOYEE NAME}

\_\_\_\_\_  
Date

**Mark  
Sklenarik**

Vice President

**Zane  
Crouch**

Secretary

\_\_\_\_\_  
{EMPLOYEE SUPERVISOR}

\_\_\_\_\_  
Date

**Jonna  
Boatright**

**Trey  
Eschberger**

**Kipp  
Rathmell**

**Danelle  
Schwertner**

# APPENDIX F



**TIME AND EFFORT FOR  
SPLIT FUNDED PERSONNEL**

Name \_\_\_\_\_

Month/Year \_\_\_\_\_

**Directions:**

1. Enter Funding Source and Percentage
2. Place X by weekend dates.
3. Enter hours worked per day for each funding source and/or absence code: #1 - Personal leave, #2 - Sick leave, #3 Holiday, #4 Other
4. Sign and submit to supervisor

Funding Source	Local Fund ( )	Federal Fund ( )	Federal Fund ( )	Absence Code	Total Hours
Percentage	__%	__%	__%		
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
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21					
22					
23					
24					
25					
26					
27					
28					
29					
30					
31					
<b>Monthly Totals</b>					
<b>Percentage</b>	<b>#DIV/0!</b>	<b>#DIV/0!</b>	<b>#DIV/0!</b>		

Total Hours Worked \_\_\_\_\_

I hereby certify that these are the actual hours worked for the programs reflected.

\_\_\_\_\_  
Employee Signature/Date

\_\_\_\_\_  
Supervisor Signature/Date

# APPENDIX G



Division of Grants Administration  
**2013-2014 Substitute System of Time-and-Effort Certificate**  
 For Employees Supported by Multiple Cost Objectives

In order to complete this Substitute System of Time-and Effort Certificate (Certificate), first complete the Substitute System of Time-and-Effort Schedule (Schedule). Once the Schedule is completed, enter the Total Numbers of Hours Worked in the Week and the Total Number of Lunch Hours in the Week in the designated field. Please ensure that both the employee and supervisor sign and date the certificate. All other fields are automatically populated from the Schedule.

Complete this Certificate for each employee based on the established employee schedule. This sample is based on a weekly schedule.

Name of Employee John Smith Schedule for Certification Period July 1, 2013-December 31, 2013  
 Position Title Teacher District/Campus(s) Anywhere ISD

Total Number of Hours Worked in the Week: 32.50 Total Number of Minutes Worked in the Week: 1,950  
 Total Number of Lunch Hours in the Week: 5.00 Total Number of Lunch Minutes in the Week: 300  
**Total Hours: 37.50 x 60 = 2,250 (a) Total Minutes: 2,250 (b)**

Program/Fund	Description	# of Minutes Worked in Weeks	Distribution of Time (%)
A	84.010 – Title I Grants to Local Educational Agencies - Fund Code 211	990	51%
B	84.027 – Special Education—Grants to States (IDEA, Part B) - Fund Code 224	330	17%
C	84.367 – Improving Teacher Quality State Grants - Fund Code 255	255	13%
D		0	0%
E		0	0%
F	Grant ABC	165	8%
G	Grant XYZ	75	4%
H	State/Local (Fund Code 199 or 420)	135	7%
<b>TOTAL MINUTES/TOTAL PERCENTAGE OF TIME:</b>		<b>1950</b>	<b>100%</b>

NOTE: Any significant deviations from an employee's established schedule (i.e., a difference from the certified schedule of 10% or greater) requires that the employee submit an updated certification. Please ensure that **Total Hours (a)** match with the **Total Minutes (b)**.

I certify that I performed work consistent with the attached schedule and as distributed in the above percentages during the certification period.

Signature of Employee \_\_\_\_\_ Date December 31, 2013

I certify that I have firsthand knowledge that the above employee performed work consistent with the attached schedule and as distributed in the above percentages during the certification period.

Name of Supervisor   
 Signature of Supervisor \_\_\_\_\_ Date December 31, 2013

Name of Employee: John Smith  
 Position Title: Teacher  
 District/Campus(s): Anywhere ISD  
 Schedule for Certification Period: July 1, 2013-December 31, 2013

Complete the fields above. In the program/fund table to the right, select programs from the dropdown lists in fields A-E. Programs not included on the dropdown list may be typed into fields F-G, including the corresponding fund code. Complete each box of the schedule below by selecting the duration of each activity from the dropdown list (in 15-minute increments); typing a brief description of the activity performed; and using the dropdown list to select the letter that corresponds to the program as listed in the program table. If applicable, select the duration of lunch from the dropdown list for each day.

Program/Fund	Minutes	Percentage
A 84.010 - Title I Grants to Local Educational Agencies - Fund Code 231	990	51%
B 84.027 - Special Education--Grants to States (IDEA, Part B) - Fund Code 224	330	17%
C 84.367 - Improving Teacher Quality State Grants - Fund Code 255	255	13%
D	0	0%
E	0	0%
F Grant ABC	165	8%
G Grant XYZ	75	4%
H State/Local (Fund Code 199 or 420)	135	7%

**TOTAL MINUTES/TOTAL PERCENTAGE OF TIME: 1950 100%**

	Monday	Tuesday	Wednesday	Thursday	Friday
Minutes:	15	15	30	15	60
Activity:	Consult w/staff regarding Title I	Consult w/staff regarding Title I	Consult w/staff regarding Title I	Consult w/staff regarding Title I	Consult w/staff regarding Title I
Program:	A	A	A	A	A
Minutes:	60	30	30	30	15
Activity:	Small group reading	Spec. Ed. Support	Spec. Ed. Support	Spec. Ed. Support	Spec. Ed. Support
Program:	C	B	B	B	B
Minutes:	15	15	15	30	60
Activity:	Consult w/staff regarding Title I	Consult w/staff regarding Title I	2nd grade Title I reading/math	2nd grade Title I reading/math	2nd grade Title I reading/math
Program:	A	A	A	A	A
Minutes:	15	15	45	30	15
Activity:	Small group reading	Small group reading	Small group reading	Small group reading	Small group reading
Program:	B	A	B	B	F
Minutes:	15	60	45	30	30
Activity:	Small group math	Small group math	Small group math	Small group math	Small group math
Program:	A	F	B	C	C
Minutes:	30	15	30	45	75
Activity:	2nd grade Title I reading/math	Consult w/staff regarding Title I	2nd grade Title I reading/math	2nd grade Title I reading/math	2nd grade Title I reading/math
Program:	A	A	A	A	A
Minutes:	30	30	30	30	30
Activity:	1st grade Title I reading/math	Title I prep	1st grade Title I reading/math	Small group writing	1st grade Title I reading/math
Program:	A	A	A	B	A
Minutes:	45	30	30	45	30
Activity:	Individual spec. ed. student catch-up	Small group writing	Individual spec. ed. student catch-up	Individual spec. ed. student catch-up	Individual spec. ed. student catch-up
Program:	C	C	B	C	B
Minutes:	30	15	60	30	45
Activity:	Small group math	Consult w/staff regarding Title I	Small group math	Small group math	Small group math
Program:	F	A	H	F	G
Minutes:	30	30	30	15	45
Activity:	Small group writing	Small group writing	Small group writing	Small group writing	Small group writing
Program:	G	F	H	C	H
Minutes:	15	15	15	15	15
Activity:	1st grade Title I reading/math	1st grade Title I reading/math	1st grade Title I reading/math	1st grade Title I reading/math	1st grade Title I reading/math
Program:	A	A	A	A	A
Minutes:	15	30	30	30	15
Activity:	Title I prep	Consult w/staff regarding Title I	Title I prep	Title I prep	Title I prep
Program:	A	A	A	A	A
Minutes:	60	15	30	45	15
Activity:	1st grade Title I reading/math	Title I prep	1st grade Title I reading/math	1st grade Title I reading/math	1st grade Title I reading/math
Program:	A	A	A	A	A
Minutes:	60	60	60	60	60
Activity:	Lunch Break	Lunch Break	Lunch Break	Lunch Break	Lunch Break

# APPENDIX H



TEXAS EDUCATION AGENCY

Office of the Chief Grants Administrator
Management Certification for Substitute System of
Time-and-Effort Reporting for Local Educational Agencies

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Name of LEA [ ] County-District Number [ ]

Certifications

In using the substitute system for time-and-effort reporting, the LEA certifies the following:

- Only eligible employees will participate in the substitute system. To be eligible, employees must meet all of the following criteria:
a. Currently work on a schedule that includes multiple activities or cost objectives that must be supported by monthly personnel activity reports.
b. Work on specific activities or cost objectives based on a predetermined schedule.
c. Not work on multiple activities or cost objectives at the exact same time on their schedule.
The system used to document employee work schedules includes sufficient controls to ensure that the system is accurate.
Any significant deviations from an employee's established schedule (i.e., a difference from the certified schedule of 10% or greater) requires that the employee submit an updated certification.
The LEA will maintain a signed and dated Substitute System of Time-and-Effort Certification form and a current, completed schedule for each eligible employee.
The LEA will maintain a list of all prior and current employees eligible to participate under the substitute system of time-and-effort reporting.
The LEA will maintain a historical and current list of eligible employees participating under this system.
The LEA has received and read the sample form developed by TEA for the substitute system of time-and-effort reporting by eligible employees, and it understands it meets the minimal requirements of TEA auditors.

This certification may be used by auditors and TEA oversight personnel when conducting audits and subrecipient monitoring of the substitute time-and-effort system.

Disclosures

Describe any known deficiencies with the system of documenting employee work schedules.

[Empty box for describing deficiencies]

Describe any challenges implementing the substitute system.

[Empty box for describing challenges]

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Name of Superintendent [ ]

Signature of Superintendent \_\_\_\_\_ Date [ ]

