

Carrollton - Farmers Branch ISD Amended Control Sub-Schedule		Date: 04 Dec 2006	Kristie Keesee	
Sub-Schedule: Purchasing		ID: CFB-06	Carrollton TX 75011	Tel. (972) 968-6331 FAX (972) 968-6335
Item / Sch.	Records Series Title	Retention	Authority/Comments	

1000-26 GR CORRESPONDENCE AND INTERNAL MEMORANDA (includes incoming and copies of outgoing correspondence and internal correspondence and memoranda).

Retention Note: The minimum retention period for correspondence or internal memoranda in categories (a) and (b) directly linked to another record series or group listed in this or other commission schedules is that assigned to the other group or series. For example, a letter from an external auditor regarding an audit of a local government's financial records should be retained for the retention period given under item number 1025-01 (e); a letter concerning a workers compensation claim should be retained for the period given under item number 1050-32, etc. The retention periods that follow are for correspondence and internal memoranda that do not readily fall within other record groups.

- a) Policy and program development - Correspondence and internal memoranda pertaining to the formulation, planning, implementation, modification, or redefinition of the policies, programs, services, or projects of a local government.
- b) Administrative - Correspondence and internal memoranda pertaining to or arising from the routine administration or operation of the policies, programs, services, and projects of a local government.
- c) Routine - Correspondence and internal memoranda such as letters of transmittal, requests for publications, internal meeting notices, and similar routine matters.

5 years.
2 years.
AV

Review before disposal; some correspondence of this type may merit permanent retention for historical reasons.

Exempt from destruction request requirement.

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1505 Randolph St

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Item / Sch.	Records Series Title	Retention	Authority/Comments
PART 4: SUPPORT SERVICES RECORDS			
SECTION 4-1: PURCHASING RECORDS			
<p><i>Retention Notes: RELATIONSHIP WITH ACCOUNTS PAYABLE RECORDS - In a local government in which purchasing and accounts payable records (see item number 1025-26) are maintained by the same individual, duplicate copies of a record need not be created and/or retained to satisfy the retention requirements of this section if the record is used in documenting both the ordering and procurement of and payment for goods and services. In such instances, retention requirements for accounts payable records prevail over those noted in this section.</i></p>			
1075-01 GR	BIDS AND BID DOCUMENTATION	<p>a) Successful bids and requests for proposals, including invitations to bid, bid bonds and affidavits, bid sheets, and similar supporting documentation. FE of award + 7 years for school districts; + 3 years for other governments.</p> <p>b) Unsuccessful bids. 2 years.</p> <p>c) Informal bid records, such a requests for quotations or estimates, for the procurement of goods or services for which state law or local policy does not require the formal letting of bids. 1 year.</p>	Exempt from destruction request requirement.
1075-03 GR	PURCHASE ORDER AND RECEIPT RECORDS	<p>a) Purchase orders, requisitions, and receiving reports. FE + 7 years for school districts; + 3 years for other governments.</p> <p>b) Purchasing log, register, or similar record providing a chronological record of purchase orders issued, orders received, and similar data on procurement status. FE + 3 years.</p> <p>c) Packing slips and order acknowledgments. AV</p> <p>d) Vendor and commodity lists. US</p>	Exempt form destruction request requirement. Exempt from destruction request requirement.
1075-19 GR	SERVICE REQUESTS/WORK ORDERS (for repairs and maintenance to facilities, vehicles, or equipment)	2 years.	
<p><i>Retention Note: If work orders serve as the only form of record documenting repairs to vehicles or equipment [see item number 1075-18(a)] they must be retained for the life of the vehicle or equipment.</i></p>			