

Personnel/Payroll File (individual file)	Retention Period (State guidelines)*
Employment Application	2 years from creation or receipt
Transcripts	Date of separation + 5 years
Certification - Texas Certificate	(US) or separation + 5 years
Certification – Out-of-State	Until receipt of TX certificate or date of separation + 5 yrs
Certification – Deficiency Plans	US by TX Certificate or date of separation + 5 yrs
Appraisal Records – Teachers	PERMANENT
Appraisal Records – All others	US + 2 years
Service Record	Date of Separation + 75 yrs
Contracts	Last effective date of contract + 4 years
UIL Acknowledgement	2 years
Salary worksheets	2 years
I-9 Forms	3 years from date of hire or 1 yr after separation - WIL
Oath of Office Forms	US + 5 years
Professional Growth Plans	4 years
Audit Verification Cards	US– Last one in file-PERMANENT
Tuberculosis Certificates	AV - Destroy at Option
Teaching schedules	1 year
Criminal History*	1 year from creation or receipt
Medical records*	US + 2 years
References*	2 years from creation or receipt
Alcohol/drug testing/physicals*	2 years
FMLA requests	Fiscal Year End (FE) + 3 years
Discipline records	2 years after case closed or action taken
Grievance records*	2 years
EEOC Cases*	Resolution of case + 3 years
EEO Reports*	3 years
Unemployment Claims*	Closure of case + 5 years
Workers Compensation Claims*	Closure of case + 5 years
Employee Recognition Awards	2 years
Employee Change Documents (name, address, etc.)	2 years
Employment Advertisements*	2 years
Employment Selection Notes, Interviews*	2 years from creation or receipt
Personnel Requisition Forms	2 years
Job Descriptions	US or position abolished + 4 years
Personnel Rosters	3 years
PEIMS Staff Data	5 years
Substitute Teacher Rosters	3 years
W-4 Form	4 years after separation or 4 yrs after amended

Voluntary deductions & Garnishments	4 years after separation, or amended/expired - WIS
Benefits – Enrollment Forms for Life/Health	Termination of Coverage + 4 years
Enrollment forms for Pension Deferred Plans	PERMANENT
Leave Request forms	Fiscal year end, plus 5 years
Direct Deposit Authorizations	US
Enrollment, beneficiary forms, records maintained by TRS	AV – Administratively valuable
Fingerprint cards	Date of separation + 5 years
Public Access Option	US
Exit Interview forms	Date of separation + 2 years
Absence form Duty forms	4 years
Earnings & Deduction records (pay amounts)	5 years
Earnings & Deduction records (deferred comp)	Date of separation + 75 years
Time Sheets	4 years