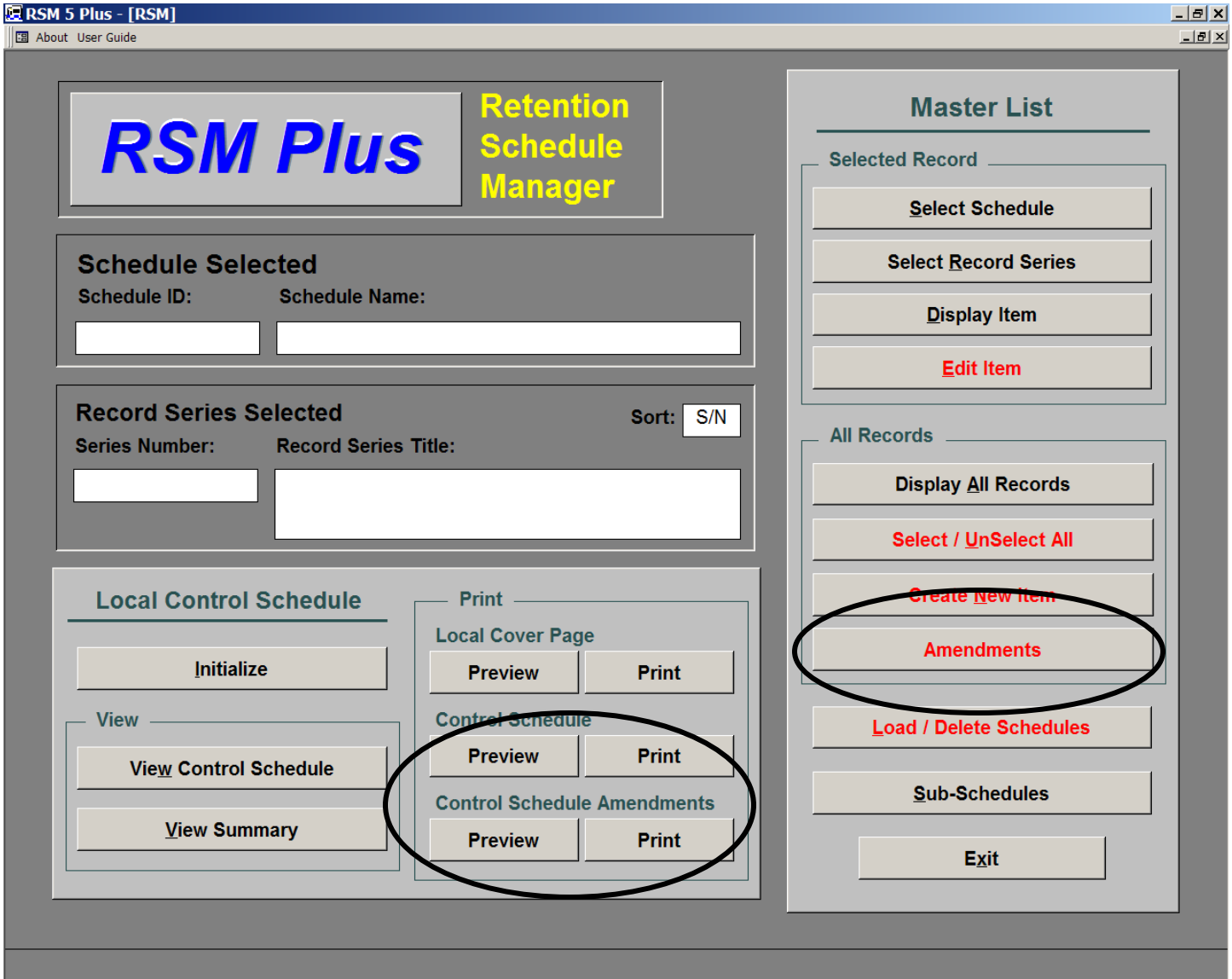


## New Features – Texas 2015 Edition, Retention Schedule Manager



The new 2015 Texas Edition of Intersect's *Retention Schedule Manager* (RSM) includes revised, formatted printouts for the Texas SLR 500 form, and for the SLR 520 Records Amendment form.

A new function extends the ability of the Records Manager to create and manage amendments to schedules. The proposed amendments are automatically tracked and printed on the SLR 520 *Amendment to Local Records Control Schedule* form for submission to the Texas State Library and Archives, Local Government Division..

RSM automatically scales to the display monitor's aspect ratio – standard or wide screen.

## New Format – Records Display Screen

RSM 5 Plus - [RSM]  
About User Guide

SD 3200-01 Selected

Record Number	Record Title	Retention Period			Incr
		Office	Storage	Total	
<input checked="" type="checkbox"/> 3200-01 SD	ACADEMIC RECORDS				
<input checked="" type="checkbox"/>	a) The academic record (TEA form AAR-001) or its former equivalent used to record academic achievement in grades 9-12.			PERMANENT	
<input checked="" type="checkbox"/>	b) Cumulative record of achievement in grades Pre-K through 8			Date of withdrawal + 5 years.	
<input checked="" type="checkbox"/> 3200-02 SD	BIRTH DATE DOCUMENTATION - Copies of birth certificates, church records, bible records, passport or immigration records, or other documents used to establish a date of birth.			AV	
<input checked="" type="checkbox"/> 3200-03 SD	CUSTODY DOCUMENTS - Copies of court instruments relating to adoption, guardianship, or custody.			Until the student is 18.	
<input checked="" type="checkbox"/>	Retention Note: It is an exception to the retention period given that a court order superseded by a subsequent order (e.g., a change in guardianship) need be retained only as long as administratively valuable and is exempt from the destruction				
<input type="checkbox"/> 3200-04 C SD	ENROLLMENT OR REGISTRATION FORMS			Date of withdrawal + 7 years.	See
<input checked="" type="checkbox"/> 3200-05 SD	HOME LANGUAGE SURVEYS			Date of withdrawal + 5 years.	See
<input checked="" type="checkbox"/> 3200-06 SD	MISSING CHILD PREVENTION AND IDENTIFICATION PROGRAM RECORDS				
<input checked="" type="checkbox"/>	a) Fingerprint cards.			Date of withdrawal.	

Record: 1097 of 1509

The 2015 edition of RSM includes the recommended Office and Storage retention fields.

## Review Screen – New, Changed, or Revised Records for SLR 520 Amendment Form

	Record Number	Record Title	Retention Total	New Record	Change Record	Delete Record	Revised Retention
<input type="checkbox"/>	3200-04 C SD	ENROLLMENT OR REGISTRATION FORMS	Date of withdrawal + 7 years.		X		X
<input type="checkbox"/>	3200-09 C SD	TEST AND ACADEMIC MEASUREMENT REPORTS					
<input type="checkbox"/>		c) District summaries on a group basis of the results of standardized testing.	5 years.		X		X
<input type="checkbox"/>	9001-01 N XL	NEW RECORD SERIES	3	X			
* <input type="checkbox"/>							

Record: 1 of 4

The 2015 edition of RSM automatically tracks user changes to records, including any text change, retention change, or deletion.

In addition, new proposed User-created records are tracked.

Any record with a proposed change is flagged at the left of the record with a C, and any proposed new record is flagged with an "N".

Once changes or revisions are submitted to the Texas State Library and Archives, Local Government Division, and are approved, the user can change the "C" and "N" designations to "A" for *Approved*, after which the changed, revised, or added records will no longer be listed as candidates for approval on the SLR 520 form.

# SLR 520 Amendment Form

AMENDMENT TO LOCAL GOVERNMENT RECORDS CONTROL SCHEDULE		Government: XYZ Independent School District						
ORIGINAL FILING		Office / Dept (If Applicable): _____						
Date: 12 Jan 2011      Substitute SLR 520      Page 1 of 1 Pages		Address: 3111 West Commerce Street						
		City: Dallas TX      Zip: 75212      Tel. (972) 925-7838						
		Records Management Officer: Mary J Smith						
Record Number	Record Title	Retention Period			Reason For Amendment			
		Office	Storage	Retention	New Record	Change Record	Delete Record	Revised Retention
3200-04 SD	> ENROLLMENT OR REGISTRATION FORMS			Date of withdrawal = 7 years.		X		X
3200-09 SD	TEST AND ACADEMIC MEASUREMENT REPORTS			1 year after recording of data in the academic achievement or cumulative record.				
	<p>a) Reports of results of TAAS, TEAMS, TABS, and other standardized state and national achievement, mental abilities, and aptitude tests reported by score, percentile rank, etc.</p> <p><i>Retention Note: If testing results of the types described are not recorded on the academic achievement or cumulative record (see item number 3200-01) either manually or by affixing labels, the results must be retained PERMANENTLY for grades 9-12 and until the date of withdrawal + 7 years for all other grades.</i></p>							
	b) Reports of results of other tests or measurements (e.g., reading/mathematics profiles).			Date of withdrawal = 5 years.				
	> c) District summaries on a group basis of the results of standardized testing.			5 years.		X		X
9001-01 XL	<b>N</b> NEW RECORD SERIES			3		X		

Note that modified rows are flagged with a “>” and new records are flagged with a “N” to assist the reviewer in quickly identifying proposed changes or additions.

The appropriate changes or additions are automatically marked with an “X” in the appropriate *New Record, Change Record, Delete Record, or Revised Retention* columns.

# Revised SLR 500 Report Form

LOCAL GOVERNMENT RECORDS CONTROL SCHEDULE		Government: XYZ Independent School District			
Original Filing Date: 12 Jan 2011		Office / Dept (if Applicable): _____			
Substitute SLR 500		Address: 3111 West Commerce Street			
1 of 2 Pages		City: Dallas TX Zip: 75212 Tel: (972) 925-7838			
		Records Management Officer: Mary J Smith			
Record Number	Record Title	Retention Period			Disposition
		Office	Storage	Retention	
<b>LOCAL SCHEDULE SD</b>					
<b>PART 1: STUDENT ACADEMIC RECORDS</b>					
<i>Retention Note: Any records in this part (e.g., enrollment cards) created for students who enroll or register in a school district, but who do not subsequently attend classes need be retained only as long as administratively valuable and are exempt from the destruction notice request.</i>					
<b>RECORDS OF PUBLIC SCHOOL DISTRICTS</b>					
3200-01 SD	ACADEMIC RECORDS			PERMANENT	
	a) The academic record (TEA form AAR-001) or its former equivalent used to record academic achievement in grades 9-12.			Date of withdrawal + 5 years	
	b) Cumulative record of achievement in grades Pre-K through 8			AV	
3200-02 SD	BIRTH DATE DOCUMENTATION - Copies of birth certificates, church records, bible records, passport or immigration records, or other documents used to establish a date of birth.			AV	
3200-03 SD	CUSTODY DOCUMENTS - Copies of court instruments relating to adoption, guardianship, or custody.			Until the student is 18.	
	<i>Retention Note: It is an exception to the retention period given that a court order superseded by a subsequent order (e.g., a change in guardianship) need be retained only as long as administratively valuable and is exempt from the destruction notice requirement.</i>				
3200-05 SD	HOME LANGUAGE SURVEYS			Date of withdrawal + 5 years	See note (b) in Appendix SD
3200-06 SD	MISSING CHILD PREVENTION AND IDENTIFICATION PROGRAM RECORDS			Date of withdrawal.	
	a) Fingerprint cards.			US, date of withdrawal or 3 years, whichever sooner.	
	b) Photographs.				

Revised SLR 500 reporting form print out.

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The new 2015 Texas Edition will be distributed to Intersect Systems users under the Annual Support Program beginning in February 2015.

Retention periods that are changed in the new schedules, or that are changed by the user, can be revised in the Records Control and Management System (RCAMS) records database. Individual changes can be re-calculated and edited directly in RCAMS ; however, where there are large numbers of records affected, the RCAMS Global Editor will automatically re-calculate the new or revised retention for each record in the records database.