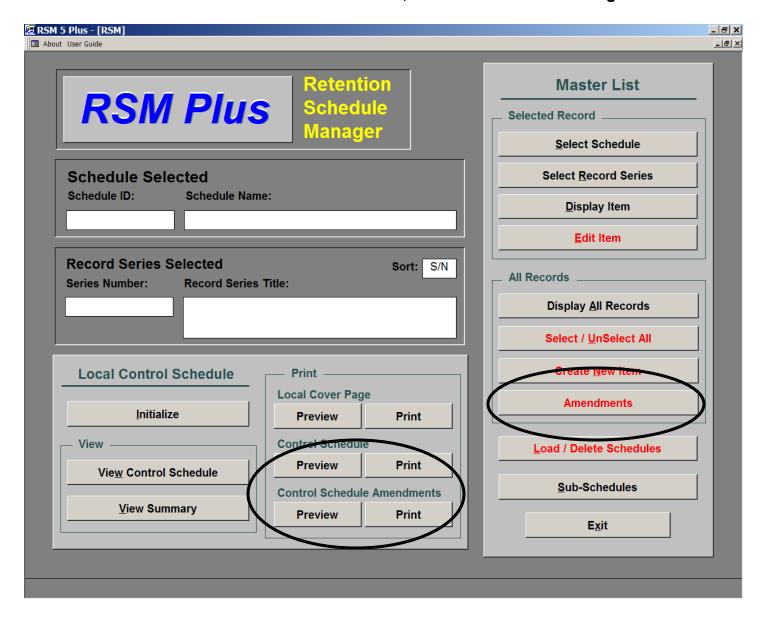# New Features – Texas 2017 Edition, Retention Schedule Manager
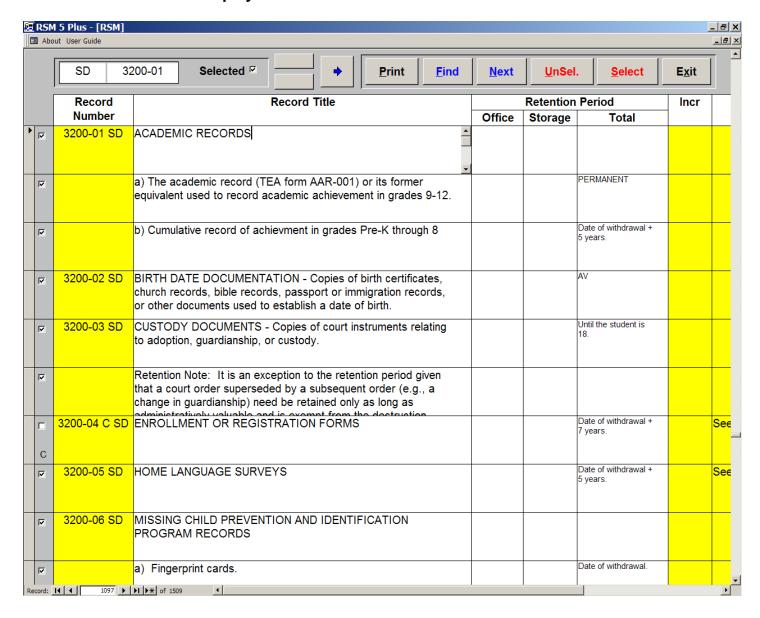

The new 2017 Texas Edition of Intersect's *Retention Schedule Manager* (RSM) includes revised, formatted printouts for the Texas SLR 500 form, and for the SLR 520 Records Amendment form.

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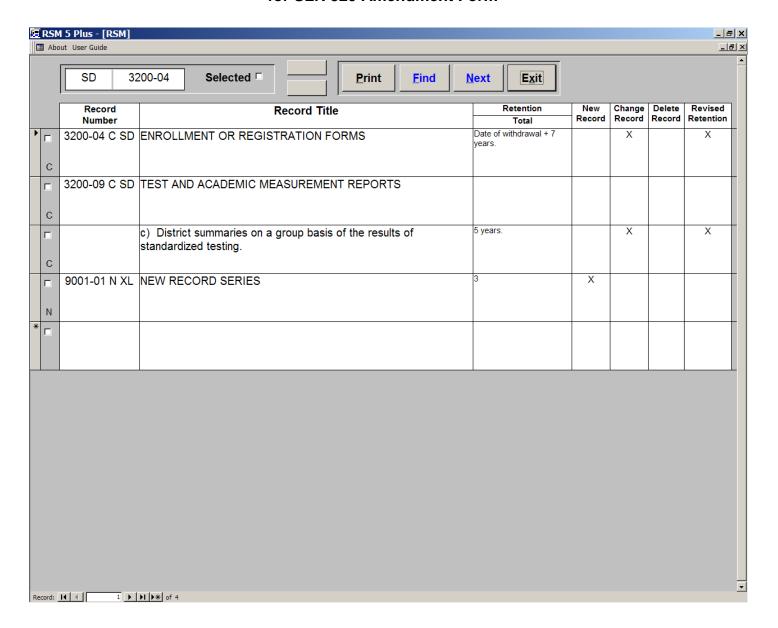
RSM automatically scales to the display monitor's aspect ratio – standard or wide screen.

New Format – Records Display Screen

About User Guide

| | SD | 3200-01 | Selected ☑ | | ➡ | Print | Find | Next | UnSel. | Select | Exit |

	Record Number	Record Title	Retention Period			Incr	
			Office	Storage	Total		
☑	3200-01 SD	ACADEMIC RECORDS					
☑		a) The academic record (TEA form AAR-001) or its former equivalent used to record academic achievement in grades 9-12.			PERMANENT		
☑		b) Cumulative record of achievment in grades Pre-K through 8			Date of withdrawal + 5 years.		
☑	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.		
☑		Retention Note: It is an exception to the retention period given that a court order superseded by a subsequent order (e.g., a change in guardianship) need be retained only as long as administratively valuable and is exempt from the destruction					
☐ C	3200-04 C SD	ENROLLMENT OR REGISTRATION FORMS			Date of withdrawal + 7 years.		See
☑	3200-05 SD	HOME LANGUAGE SURVEYS			Date of withdrawal + 5 years.		See
☑	3200-06 SD	MISSING CHILD PREVENTION AND IDENTIFICATION PROGRAM RECORDS					
☑		a) Fingerprint cards.			Date of withdrawal.		

Record: ◀◀ ◀ 1097 ▶ ▶◀ ▶* of 1509

The 2017 edition of RSM includes the recommended Office and Storage retention fields.

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

About   User Guide

| SD | 3200-04 | Selected ☐ | | Print | Find | Next | Exit |

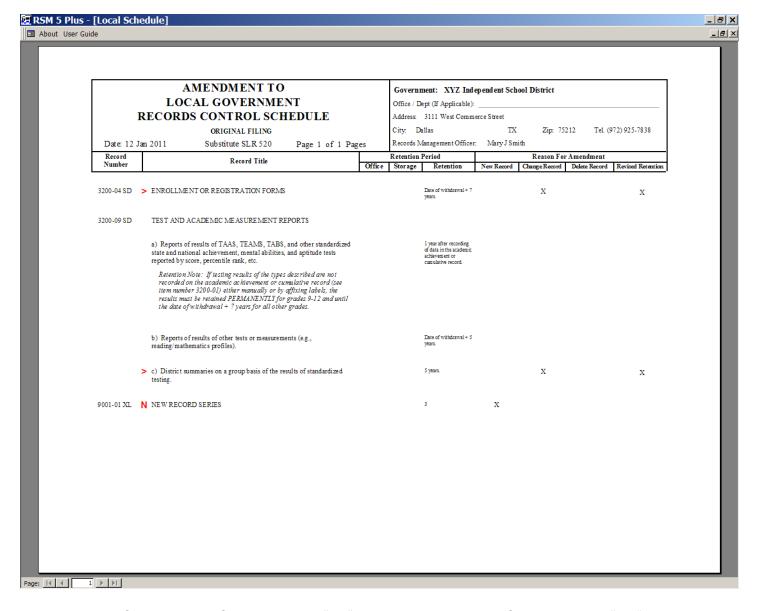|	Record Number	Record Title	Retention Total	New Record	Change Record	Delete Record	Revised Retention
☐ C	3200-04 C SD	ENROLLMENT OR REGISTRATION FORMS	Date of withdrawal + 7 years.		X		X
☐ C	3200-09 C SD	TEST AND ACADEMIC MEASUREMENT REPORTS					
☐ C		c) District summaries on a group basis of the results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

Record: ◄◄ ◄ [1] ► ►► ►* of 4

The 2017 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.
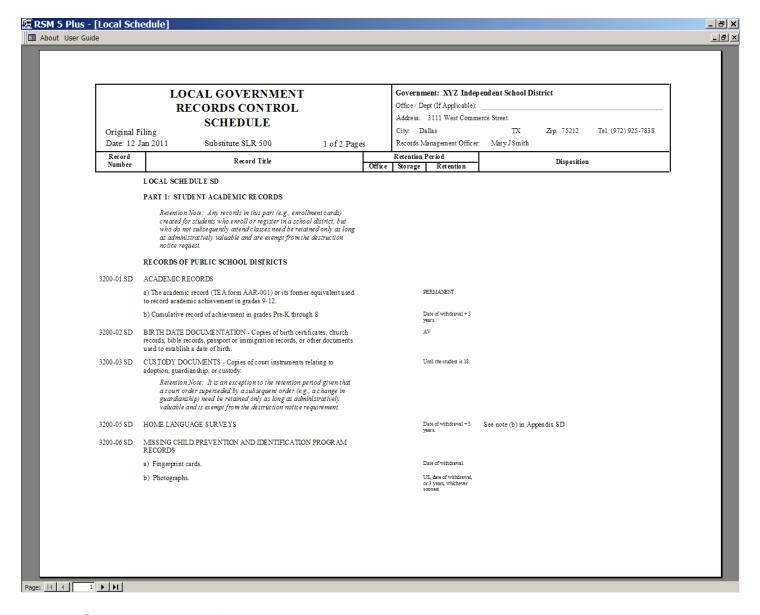
SLR 520 Amendment Form

**AMENDMENT TO
LOCAL GOVERNMENT
RECORDS CONTROL SCHEDULE**

ORIGINAL FILING

Date: 12 Jan 2011   Substitute SLR 520   Page 1 of 1 Pages

Government: XYZ Independent School District
Office / Dept (If Applicable): _____
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							
	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.			1 year after recording of data in the academic achievement or cumulative record.				
	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.							
	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 N	NEW RECORD SERIES			3	X			

Page: |◀ ◀ 1 ▶ ▶|

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

RSM 5 Plus - [Local Schedule]

About User Guide

LOCAL GOVERNMENT RECORDS CONTROL SCHEDULE	Government: XYZ Independent School District

Original Filing
Date: 12 Jan 2011   Substitute SLR 500   1 of 2 Pages

Government: XYZ Independent School District
Office / Dept (If Applicable): _____
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			Disposition
		Office	Storage	Retention	

LOCAL SCHEDULE SD

PART 1: STUDENT ACADEMIC RECORDS

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.

RECORDS OF PUBLIC SCHOOL DISTRICTS

3200-01 SD	ACADEMIC RECORDS				
	a) The academic record (TEA form AAR-001) or its former equivalent used to record academic achievement in grades 9-12.			PERMANENT	
	b) Cumulative record of achievment in grades Pre-K through 8			Date of withdrawal + 5 years.	
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.	

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.

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				
	a) Fingerprint cards.			Date of withdrawal.	
	b) Photographs.			US, date of withdrawal, or 3 years, whichever soonest.	

Page: |◄ ◄ [1] ► ►|

Revised SLR 500 reporting form print out.

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The new 2017 Texas Edition will be distributed to Intersect Systems users under the Annual Support Program beginning in February 2017.

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.