

Fort Bend County Tax Office Records Disposition Log

Prepared by Lori Matula Dept Name: Tax Research Date 6/14/2017  
RMO Approval Signature: [Signature] Date 6-14-17  
Submitted to Comm Court by: [Signature] Date 6/14/17  
Commissioners Court Agenda Date: June 27, 2017

| Information from the Records Retention Schedule |                                          |                  | Record Data                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                          | Disposition Method: See legend below |                 | Enter "X" after approved → |         |         |
|-------------------------------------------------|------------------------------------------|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------------------|-----------------|----------------------------|---------|---------|
| Record Number                                   | Records Series Title                     | Retention Period | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | From-To Dates of Records | Action                               | Volume/Quantity | Actual Disposition Date    | Initial | See Att |
| TX3000-02                                       | Appraisal Rolls, Amendments, and Notices | 3 years          | 2010 – 2012 Change in value per Lawsuit                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | 1/1/2010 – 12/31/2012    | S                                    | 3               |                            |         |         |
| TX3000-02                                       | Appraisal Rolls, Amendments, and Notices | 3 years          | System Correction Folders - 2008 Supl #77-85; 2009 Supl #53-64; 2010 Supl #37-48; 2011 Supl # 24-35; 2012 Supl #13-26; 2013 Supl #6-11; Ceiling Cert/Freeze Corrections; NSF Charge Removed/Added; Return Check Charge Removed; 2008 thru 2013 Lawsuit Corrections (FB); WCAD 2012 Supl #11, 14, & 19-20; BYRS WCAD Supl #22; WCAD 2013 Supl #5-7; HCAD 2009 Supl #50; HCAD 2010 Supl # 38-39; HCAD 2011 Supl #27-28; HCAD 2012 Supl #8-9, 12, 15-18; HCAD 2013 Supl #4-6; BYRS HCAD Supl #12, 19-20; HCAD Supl #23; 2012/BYRS HCAD Lawsuit | 4/16/2013 – 4/11/2014    | S                                    | 5               |                            |         |         |
| TX3000-02                                       | Appraisal Rolls, Amendments, and Notices | 3 years          | 2010 – 2012 Name and Address Return Mail                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | 1/12/2012 – 2/7/2013     | S                                    | 1               |                            |         |         |
| TX3000-09                                       | Tax Bills or Statements                  | 1 year           | 2014 Lock Box Envelopes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | 2/3/2015 – 2/24/2016     | S                                    | 10              |                            |         |         |
| TX3000-09                                       | Tax Bills or Statements                  | 1 year           | 2014 – 2015 Jaguar Backup & Reports                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | 6/1/2015 – 5/4/2016      | S                                    | 65              |                            |         |         |

**Legend**  
Retention Period Codes: FE/Fiscal year; AC/See Ret Schedule; US/Until superseded; CE/Calendar year; LA/Life of Asset; AV/Administratively Valuable; PM/Permanent  
Actions: R/Recycling (open records only); S/Shred; B/Burn; P/Pulp; D/Delete electronic records; A/Transfer to Archives; AR/Archival Review needed  
Disposition Date: AFTER NOTIFICATION OF APPROVAL-Date put in recycling; added to locked bin for confidential shredding; deleted; or sent to Archives  
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| Information from the Records Retention Schedule |                                          |                  | Record Data                                                                                                                                                                                                                                                                                                                                                                                                                            |                          | Disposition Method: See legend below |                 | Enter "X" after approved → |         |         |
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| Record Number                                   | Records Series Title                     | Retention Period | Description                                                                                                                                                                                                                                                                                                                                                                                                                            | From-To Dates of Records | Action                               | Volume/Quantity | Actual Disposition Date    | Initial | See Att |
| TX3000-09                                       | Tax Bills or Statements                  | 1 year           | Return Mail With & Without Forwarding Address                                                                                                                                                                                                                                                                                                                                                                                          | 5/27/2015 – 4/4/2016     | S                                    | 11              |                            |         |         |
| TX3000-09                                       | Tax Bills or Statements                  | 1 year           | Misc. Return Mail                                                                                                                                                                                                                                                                                                                                                                                                                      | 8/26/2014 – 12/29/2014   | S                                    | 1               |                            |         |         |
| TX3000-09                                       | Tax Bills or Statements                  | 1 year           | Return Mail Temporarily Away                                                                                                                                                                                                                                                                                                                                                                                                           | 11/17/2014 – 7/21/2015   | S                                    | 1               |                            |         |         |
| TX3000-10                                       | Tax Certificate Records                  | 2 years          | 2013 – 2014 Written Statements                                                                                                                                                                                                                                                                                                                                                                                                         | 7/1/2013 – 6/30/2014     | S                                    | 2               |                            |         |         |
| TX3000-12                                       | Tax Correspondence                       | 2 years          | 2014 Duplicate Payments                                                                                                                                                                                                                                                                                                                                                                                                                | 1/1/2014 – 12/31/2014    | S                                    | 2               |                            |         |         |
| TX3000-12                                       | Tax Correspondence                       | 2 years          | 2013 – 2014 Correspondence                                                                                                                                                                                                                                                                                                                                                                                                             | 1/1/2013 – 6/30/2014     | S                                    | 3               |                            |         |         |
| TX3000-12                                       | Tax Correspondence                       | 2 years          | 2014 Tax Statement Request A-Z                                                                                                                                                                                                                                                                                                                                                                                                         | 1/1/2014 – 12/31/2014    | S                                    | 1               |                            |         |         |
| TX3000-02                                       | Appraisal Rolls, Amendments, and Notices | 3 years          | 2010 – 2013 Supplement Return Mail – 2010 FBC Supl #11-21, 23-24, 26-27, 31-42; 2010 HCAD Supl #3; 2011 FBC Supl #5-15, 17-30; 2011 HCAD Batch #6; 2011 HCAD Supl #20; 2012 FBC Supl #4, 6-10, 12-20; 2012 HCAD Supl #2-3, 5 & 8; 2012 WCAD Supl #6; 2013 FBC Supl #5                                                                                                                                                                  | 4/1/2011 - 11/30/2013    | S                                    | 2               |                            |         |         |
| TX3000-02                                       | Appraisal Rolls, Amendments, and Notices | 3 years          | 2012 Name & Address/ 2008, 2009 & 2010 Supplement Return Mail-2012 Jan N/A #1; 2012 Feb N/A #2; 2012 Mar N/A #3; 2012 WCAD Name Chg #1; 2012 HCAD Batch #5; 2012 HCAD N/A Chg #10; 2012 July N/A #7; 2012 Aug N/A #8; 2012 Sept #9 3; 2008, 2009 & 2010 Supl Returned Mail; 2008 FBC Supl #55, 58-59, 61, 63-64, 72-75, 77, 79-82; 2009 FBC Supl #19, 23-25, 27-37, 39-40, 42, 47-51, 53, 55-58; 2009 HCAD Supl #8; 2010 FBC Supl #4-9 | 2/15/2013 – 10/31/2013   | S                                    | 1               |                            |         |         |

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| TX3000-02                                       | Appraisal Rolls, Amendments, and Notices | 3 years          | 2008-2010 Supplement Processing Folders-2008 FBCAD Supl 66-76, 2009 FBCAD Supl 42-52, 2010 FBCAD Supl 26-36, 2008 HCAD Supl 45-53, 2009 HCAD Supl 33-38, 2010 HCAD Supl 21-29, 2008 HCAD CD Batch/Supl#1-12 & 2008 HCAD CD Preliminary Roll Files, 2008 HCAD CD Roll Files & Reports & 2008 HCAD CD Certified Roll Files | 6/1/2012 - 12/31/2013    | S                                    | 1               |                            |         |         |
| TX3000-02                                       | Appraisal Rolls, Amendments, and Notices | 3 years          | 2008-2011 Supplement Folders – 2008 Supl #84-86, 2009 Supl #55-63, 2010 Supl #39-47, & 2011 Supl #24-34                                                                                                                                                                                                                  | 4/1/2013 - 5/2/2014      | S                                    | 1               |                            |         |         |
| TX3000-02                                       | Appraisal Rolls, Amendments, and Notices | 3 years          | 2008-2014 Waller & Harris CAD Supplement Folders (HCAD) 2008 Supl #55-56 & 58, 2009 Supl #43-46, 2010 Supl #30-33, 2011 Supl #20-23, 2012 Supl #9-14, 2013 Supl #2-3 (WALLER) 2012 NA #3, 2012 Supl #1-9, 11, 14, 16 & 18, 2013 Supl #3, 5 & 12, 2014 NA #1                                                              | 8/1/2012 - 1/31/2014     | S                                    | 1               |                            |         |         |
| TX3000-02                                       | Appraisal Rolls, Amendments, and Notices | 3 years          | 2008-2011 FBCAD Supplement Processing 2008 Supl #77-82, 2009 Supl #53-54, 2010 Supl #57-58, 2011 Supl #1, 12 & 15-23, 2012 Supl #18-25, 2013 Supl #7 & NA 8-10                                                                                                                                                           | 4/1/2013 – 3/31/2014     | S                                    | 2               |                            |         |         |
| TX3000-16                                       |                                          | 3 years          | 2012 – Prior Paid Rollback Files                                                                                                                                                                                                                                                                                         | 10/1/2012 – 9/30/2013    | S                                    | 2               |                            |         |         |
| TX3000-10                                       | Tax Certificate Records                  | 2 years          | 2014 – Prior Map Clearance Certificates                                                                                                                                                                                                                                                                                  | 1/1/2014 – 12/31/2014    | S                                    | 8               |                            |         |         |
| TX3000-10                                       | Tax Certificate Records                  | 2 years          | 2014 – Prior Tax Certificates; Tax Certificate Security Code Log With copy of Tax Certificate & Voided Tax Certificates                                                                                                                                                                                                  | 1/1/2013 – 12/31/2014    | S                                    | 7               |                            |         |         |
| TX3000-16                                       | Tax Receipts                             | 3 years          | 2012 – 2013 Temporary Receipt log sheets                                                                                                                                                                                                                                                                                 | 10/01/2012 – 9/30/2013   | S                                    | 1               |                            |         |         |
| TX3000-12                                       | Tax Correspondence                       | 2 years          | 2014 Mortgage Backup                                                                                                                                                                                                                                                                                                     | 1/1/2014 – 12/31/2014    | S                                    | 1               |                            |         |         |
| TX3000-12                                       | Tax Correspondence                       | 2 years          | 2014 Faxes                                                                                                                                                                                                                                                                                                               | 1/1/2014 – 12/31/2014    | S                                    | 1               |                            |         |         |

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| TX3000-12                                       | Tax Correspondence                       | 2 years          | 2014 General Correspondence                                                         | 1/1/2014 – 12/31/2014    | S                                    | 1               |                            |         |         |
| TX3000-12                                       | Tax Correspondence                       | 2 years          | 2014 Misc. letters                                                                  | 1/1/2014 – 12/31/2014    | S                                    | 1               |                            |         |         |
| TX3000-12                                       | Tax Correspondence                       | 2 years          | 2015 Duplicate letters                                                              | 1/1/2015 – 6/17/2015     | S                                    | 2               |                            |         |         |
| TX3000-02                                       | Appraisal Rolls, Amendments, and Notices | 3 years          | 2013 Lawsuits (including HCAD)                                                      | 1/1/2013 – 12/31/2013    | S                                    | 1               |                            |         |         |
| GR1025-26A                                      | Accounts Payable & Disbursement Records  | 5 years          | 2010 Special Inventory Tax                                                          | 10/1/2010 – 9/30/2011    | S                                    | 6               |                            |         |         |
| GR1025-27A                                      | Accounts Receivable Records              | 3 years          | 2002 – 2010 Wine, Beer & Liquor Verification Log Book                               | 3/1/2002 – 3/11/2010     | S                                    | 1               |                            |         |         |
| 1075-40B                                        | Postal & Delivery Service Records        | 1 year           | 2012 – 2013 Night Box Tracking Tapes & Mail Count Log & 2013 Express Mail Log Sheet | 10/1/2012 – 9/30/2013    | S                                    | 1               |                            |         |         |
| GR1075-41                                       | Telephone Logs or Activity Reports       | 2 years          | 2014- Prior Phone Logs                                                              | 10/1/2012 – 8/30/2014    | S                                    | 1               |                            |         |         |
| GR1075-41                                       | Telephone Logs or Activity Reports       | 2 years          | 2014 – Prior Research Dept. phone logs and customer sign in sheets                  | 1/1/2012 – 12/31/2014    | S                                    | 1               |                            |         |         |
| TX3050-02                                       | Liquor Licensing Receipts                | 3 years          | 2013 office copy of WBL Receipts                                                    | 10/1/2012 – 9/30/2013    | S                                    | 1               |                            |         |         |

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