

Fort Bend County Tax Office Records Disposition Log

Prepared by Lori Matula Dept Name: Tax Research Date 9/25/2017

RMO Approval Signature: Patsy Schuff Date 9-25-17

Submitted to Comm Court by: Marcy Ford Date 9-25-17

Commissioners Court Agenda Date: October 3, 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	System Correction Folders - 2009 Supl #66-70; 2010 Supl #49-55; 2011 Supl # 36-41; 2012 Supl #26-32; 2013 Supl #11-18; Freeze Corrections; Adj. Refunds; NSF Charge Removed; 2007 - 2013 Lawsuit Corrections (FB); WCAD 2013 Supl #8-13; HCAD 2011 Supl # 31; HCAD 2012 Supl #19-22; 2013 HCAD Supl #7-11	4/14/2014 – 9-9-2014	S	2			
TX3000-07	Payment Options or Postponement, Request for	AV	2013 – 2015 Escrow Contracts	10/1/2012 – 9/30/2015	S	1			
TX3000-13	Tax Lien Transfer Records	AV	2014 Tax Lien Transfers & Releases	1/1/2014 – 12/31/2014	S	1			
TX3000-09	Tax Bills or Statements	1 year	2015 Jaguar Backup & Reports	5/5/2016 - 9/21/2016	S	4			
TX3000-09	Tax Bills or Statements	1 year	Return Mail With & Without Forwarding Address	4/5/2016 – 5/31/2016	S	1			
TX3000-10	Tax Certificate Records	2 years	2014 - 2015 Written Statements	7/1/2014 – 6/30/2015	S	2			
TX3000-10B	Tax Certificate Records	AV	2005-2006 FBISD Tax Certificate Request & Diskett/PAS	9/1/2005 – 5/30/2006	S	1			
TX3000-12	Tax Correspondence	2 years	2014 – 2015 Correspondence	7/1/2014 – 6/30/2015	S	2			

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Retention Period Codes: FE/Fiscal year; AC/See Ret Schedule; US/Until superseded; CE/Calendar year; LA/Life of Asset; AV/Administratively Valuable; PM/Permanent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

See Att (See Attachment): Put an X in this field if there is an attachment giving more detail about the records being destroyed.

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TX3000-12	Tax Correspondence	2 years	Problem Taxpayer Files (Paid)	8/24/1990 – 12/30/2014	S	9			
TX3000-13	Tax Lien Transfer Records	AV	2012 – 2013 Transfer of Tax Liens	1/1/2012 – 12/31/2013	S	2			
TX3000-16	Tax Receipts	3 years	2013 – Prior Paid Rollback Files	10/1/2013 – 9/30/2014	S	2			
TX3000-16	Tax Receipts	3 years	2013 – Prior Waiver Request	1/1/2012 – 9/30/2014	S	2			
TX3000-19	Tax Seizure and Foreclosure Records	AV	Resales	1/1/2014 – 12/31/2014	S	1			
TX3000-05	Delinquent Tax Rolls	1 year	2012 – 2014 Delinquent File Request, 2014 "404 file, 2014 Autoagent (Nov 2013 – Dec 2014)	4/1/2012 – 01/02/2015	S	1			
GR1000-26	Correspondence, Internal Memoranda, And Subject Files	5 years	2010 - 2012 Entity Jurisdiction Folders	7/2010 – 7/2012	S	2			
GR1025-26	Accounts Payable and Disbursement Records	5 years	2010 – 2011 Line Item Folders	10/1/2010 – 9/30/2011	S	1			
GR1025-26A	Accounts Payable and Disbursement Records	5 years	2011 Special Inventory Tax	10/1/2011 – 9/30/2012	S	7			
GR1025-26A	Accounts Payable and Disbursement Records	5 years	2010 Special Inventory Tax, 2010 Monthly Balancing, Declaration Postings & Rollover Process Files/Reports	10/1/2010 – 9/30/2011	S	1			
GR1025-31A	Transaction Summaries	30 days	Lockbox Receipts Report	1/1/2014 – 5/29/2014	S	1			

Legend

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