
CAUTION

A state record whose retention period has expired may not be destroyed if any litigation, claim, negotiation, audit, public information request, administrative review, or other action involving the record is initiated; its destruction shall not occur until the completion of the action and the resolution of all issues that arise from it.

A state record whose retention period expires during any litigation, claim, negotiation, audit, public information request, administrative review, or other action involving the record may not be destroyed until the completion of the action and the resolution of all issues that arise from it.





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Retention Codes (field 7)

AC – See field 9 for specific records series definition
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A/I – Transfer to State/University Archivist
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					Years	Months	Days				
01.100.10	1.1.002	Audits	Audits and reviews performed by or on behalf of an agency, including the working papers that support the audit. Also includes audits performed on the agency audits	AC	7			AC=Publication or release of final audit findings.		The State Auditor's Office retains any copies of its audits performed on Texas state agencies.	
01.100.20		Compliance Program Records	Records documenting TAMUS/System Member compliance activities.	AC				AC=Retain the longer of applicable federal or state laws or regulations, TAMUS requirements, or administrative value.		Note: This applies to compliance program records not covered by another records series.	
01.100.30		Civil Rights Complaint Records	Records related to the receipt, investigation, and resolution of a complaint alleging the violation of an individual's civil rights.	AC	3			AC=Final disposition of the complaint or longer as required by state or federal law.		Note: Employee or student disciplinary records arising from the complaint should be retained in accordance with the applicable retention periods (for employees, see Agency Item Nos. 03.109.10 or 03.110.10; for students, see Agency Item No. 06.218.10). This item also does not include a complaint filed with an external enforcement agency, follow Item No. 1.1.048.	



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01.101.10	1.1.004	Legislative Appropriations Requests	Including any supporting documentation created and/or used to justify and support legislative appropriations requests by an agency.	AC	6			AC = September 1 of odd-numbered calendar years.	I	ARCHIVES NOTE: The archival requirement is met by sending the required copies of the requests to the Texas State Publications Depository Program, Texas State Library and Archives Commission. Only copies of supporting documentation submitted to the Legislative Budget Board are archival.	
01.102.10	1.1.006	Complaint File	Complaints received by an agency from the public concerning the agency and records pertaining to the resolution of the complaint.	AC	2			AC=Final disposition of the complaint		CAUTION: If a complaint becomes the subject of litigation, it must be included in and is subject to the minimum retention period of item number 1.1.048. This item does not include civil rights complaint records, see Agency Item No. 01.100.30.	



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01.103.10	1.1.007	Correspondence - Administrative	Incoming/outgoing and internal correspondence, in any format, pertaining to the formulation, planning, implementation, interpretation, modification, or redefinition of the programs, services, or projects of an agency and the administration of policies, procedures and programs that govern them.		4				O	ARCHIVES NOTE: Only the administrative correspondence of executive staff, board or commission members, division directors and program heads require archival review. Contact the State Archives when these records have met their retention periods. Should be considered for retention in archives. CAUTION: This records series and item number 1.1.008 should be used only for correspondence that is not included in or directly related to another records series on the agency's approved schedule. For example, a memorandum that documents an appropriations request must be retained for the minimum retention period prescribed by item number 1.1.004: a letter concerning an audit for that prescribed by item number 1.1.002, etc. SEE ALSO item number 1.1.010	



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01.104.10	1.1.008	Correspondence - General	Non-administrative incoming/outgoing and internal correspondence, in any media, pertaining to or arising from the routine operations of the policies, programs, services, or projects of an agency. (includes interoffice correspondence; excludes directories)		2					SEE comments to item number 1.1.007. SEE ALSO item number 1.1.010	
01.105.10	1.1.010	Directives	Routine issuances on general office procedures	US	1						
01.106.10	1.1.011	Executive Orders	Any document that initiates, rescinds, or amends a regulation, policy, or procedure that governs the programs, services, or projects of an agency.	US	3				I		



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01.107.10	1.1.013	Calendars, Appointments and Itinerary Records	Desk calendars, appointment books, and similar records, purchased with state funds that documents appointments, itineraries, and other activities of an agency official or employee.	CE	1				O	ARCHIVES NOTE: Only the calendars, appointment, and itinerary records of elected officials, executive staff, board or commission members, division directors, and program heads require archival review. Contact the State Archives when these records have met their retention periods. CAUTION: A record of this type purchased with personal funds, but used by a state official or employee to document his or her work activities may be a state record and subject to the retention period. See Open Records Decision 635 issued in December 1995 by the Attorney General.	



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01.108.10	1.1.014	Legal Opinions and Advice	From agency legal counsel or the Attorney General including request eliciting the opinions	AV					O	CAUTION: Does not include legal opinions or advice rendered on a matter in litigation or with regard to pending litigation. SEE item number 1.1.048	
01.109.10	1.1.019	Public Relations Records	News or press releases issued by the agency. Includes print, electronic, audio, and audiovisual		2				O		
01.110.10	1.1.020	Public Information Requests, Requested information disclosed	Includes all correspondence and documentation relating to requests for records that are furnished to the public under Public Information Act (Chapter 552, Government Code).	AC	2			AC=Date Request Fulfilled		NOTE: If a portion of the records are withheld from disclosure, item no. 1.1.021 applies instead of this records series.	



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					Years	Months	Days				
01.111.10	1.1.021	Public Information Requests, Requested information withheld	Includes all correspondence and documentation relating to requests for records that are excepted from disclosure or confidential under Public Information Act (Chapter 552, Government Code).	AC	2			AC = The latest of the following dates, as applicable; the date of the institution's or agency's receipt of the office of the attorney general's decision that records are excepted from disclosure or confidential, or if an attorney general decision is not required, the date the records are determined to be excepted from disclosure or confidential, or the date the institution or agency provides to the requestor the portion of the records that are not excepted from disclosure or confidential.			
01.112.10	1.1.023	Organization Charts		US					I		



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01.113.10	1.1.024	Plans and Planning Records	Plans and records relating to the process of planning new or redefined programs, services or projects of an agency that are not included in or directly related to other records series in this schedule.	AC	3			AC=Decision made to implement or not to implement result of planning process	O	ARCHIVES NOTE: Data processing planning records are not archival.	
01.114.10	1.1.026	Texas Register Submissions	Copies of all proposed, withdrawn, emergency, and adopted rules; open meeting notices; or any other documents required by law to be submitted to the Texas Register.	AC	1			AC=Date of publication in the Texas Register			
01.115.10	1.1.027	Proposed Legislation	Drafts of proposed legislation and related correspondence.	AV							
01.116.10	1.1.038	Customer Surveys	Surveys returned by the customers or clients of an agency, and the statistical data maintained rating an agency's performance.	AC				AC = Final disposition of summary report			
01.117.10	1.1.040	Speeches, Papers and Presentations	Notes or text of papers, presentations, or reports delivered in conjunction with agency work.	AC				AC = End of term in office or service in a state position.	O		
01.118.10	1.1.041	Suggestion System	Suggestions submitted by agency personnel and responses.		1						



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01.119.10	1.1.043	Training Manuals	Instructional materials developed by an agency for training entities or individuals it regulates or serves.	US	1						
01.120.10	1.1.048	Litigation Files	Records created by or on behalf of an agency in anticipation of or in the adjudication of a lawsuit.	AC	1			AC=As applicable, decision of an agency not to file a lawsuit or decision that a lawsuit will not be filed against it on a matter; dismissal of a lawsuit for want of prosecution or on motion of the plaintiff; or final decision of a court (or of a court on appeal, if applicable) in a lawsuit.	O	Cases that set legal precedent or exhibit historical value will be evaluated by the Archives and Information Services Division of the Texas State Library and Archives Commission for archival preservation.	
01.120.20		Liability Waivers		AC	1			AC = Expiration of the applicable statute of limitations.	O	For example, the limitations period for a personal injury suit is generally two years from the date of the injury or death.	
01.121.10	1.1.053	Registration Logs	Logs or similar records used to register persons appearing before state agencies as required by Chapter 2004, Government Code, including quarterly reports filed with the Texas Ethics Commission.	AC				AC = Report filed with the Texas Ethics Commission.			



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01.122.10	1.1.055	Strategic Plans	Includes information resources and operational strategic plans prepared in accordance with Tex. Govt. Code, §§ 2054.095 and 2056.002.	AC	6			AC = September 1 of odd-numbered calendar years	I	ARCHIVES NOTE: The archival requirement is met by sending the required copies of the plans to the Texas State Publications Depository Program, Texas State Library and Archives Commission.	
01.123.10	1.1.056	ADA (American with Disabilities Act Documentation	Self evaluations and plans documenting compliance with Americans With Disabilities Act.		3						28 Code of Federal Regulations (CFR) § 35.105 (c)



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01.124.10	1.1.057	Transitory Information	Records of temporary usefulness that are not an integral part of a records series of an agency, that are not regularly filed within an agency's recordkeeping system, and that are required only for a limited period of time for the completion of an action by an official or employee of the agency or in the preparation of an on-going records series. Transitory records are not essential to the fulfillment of statutory obligations or to the documentation of agency functions. Some examples of transitory information, which can be in any medium (voice mail, fax, email, hard copy, etc.) are routine messages; internal meeting notices; routing slips; incoming letters; telephone messages; or memoranda of transmittal that add nothing of substance to enclosures; and similar routine information used for communication, but not for the documentation, of a specific agency transaction.	AC				AC=Purpose of record has been fulfilled.		CAUTION: Records management officers should use caution in assigning this records series item number to records of an agency to make certain they are not part of another records series listed in this schedule or, for records series unique to an agency, are not part of a records series that documents the fulfillment of the statutory obligations of the agency or the documentation of its functions. The disposal of transitory information need not be documented through destruction sign-offs (1.2.001) or in records disposition logs (1.2.010), but agencies should establish procedures governing disposal of these records as part of its records management plan (1.2.014).	



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01.125.10	1.1.058	Meeting Agenda and Minutes	Official agenda and minutes of state boards, committees, commissions, and councils that conduct open meetings as required by Government Code Chapter 551.	PM					I	ARCHIVES NOTE: Agency retains permanent record copy. The archival requirement will be met by sending a copy to the Archives and Information Services Division, Texas State Library and Archives Commission. CAUTION: This records series and item numbers 1.1.059, 1.1.060, 1.1.061, and 1.1.062 must be used for those state boards, committees, commissions, and councils, which by law or the biennial Appropriations Act, are administered by another state agency. These records and all others related to the functions of any of these dependent entities must be included in the records retention schedule of the administering agency.	



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01.126.10	1.1.059	Meetings, Certified Agendas or Tape Recordings of Closed	Certified agendas or tape recordings of closed meetings of state boards, commissions, committees, and councils	AC	2			AC = The data of the meeting or completion of pending action involving the meeting, whichever is later.		Government Code, 551.104(a). SEE caution comment at item number 1.1.058.	
01.127.10	1.1.060	Meetings, Audio and Videotapes of Open	Audio or videotapes of open meetings of state boards, commissions, committees, etc.	AC			90	AC = Official Approval of written minutes of the meeting by governing body of an agency		CAUTION: Minutes of state agencies are permanent records. Audio and videotapes are not permanent media. State agencies may not retain audio or videotapes of the meetings of governing bodies in lieu of written minutes. The proceedings of all meetings of state boards, committees, commissions, and councils must be reduced to writing. See caution comment at item number 1.1.058.	
01.128.10	1.1.061	Meeting Notes	Notes taken during open meetings of state boards, commissions, committees, and councils from which written minutes are prepared.	AC			90	AC = Approval of the formal minutes by the governing body.		SEE caution comment at item number 1.1.058.	



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01.129.10	1.1.062	Meetings Supporting Documentation	Documents submitted at meetings of state boards, commissions, committees, and councils including exhibit items, documentation for agenda items, etc. Includes documents sent in advance of meetings for briefing purposes, some of which may not be submitted at an actual meeting.		2				I	SEE caution comment at item number 1.1.058.	
01.130.10	1.1.063	Staff Meeting Minutes/Notes	Minutes or notes, and supporting documentation taken at internal agency staff meetings		1						
01.131.10	1.1.064	Agency Performance Measure Documentation	Any records of an agency needed for the documentation of output, outcome, efficiency, and explanatory measures in an agency's appropriations request or strategic plan, and for performance measures used to manage the agency.	FE	3					CAUTION: The FE+3 retention period overrides any shorter retention period for a records series in this schedule if the records series is needed for documentation of agency performance measures.	



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01.132.10	1.1.065	Reports and Studies (Non-Fiscal) - Raw Data	Information or data collected and compiled for the purpose of producing non-fiscal reports.	AV						CAUTION: Does not include source documentation used for information or data included in or directly related to another records series in this schedule. SEE especially item number 1.1.064.	
01.133.10	1.1.066	Reports, Annual and Biennial Agency (Narrative)	Biennial narrative reports to the governor and legislature as required by an agency's enabling statutes, including annual narrative reports if they are required by statute.	AC	6			AC=September 1st of odd-numbered calendar years	I	Agency retains the Record Copy and sends required copies to the Publications Depository Program	
01.134.10	1.1.067	Reports and Studies (Non-fiscal)	Annual, sub-annual, or special reports or studies on non-fiscal aspects of an agency's programs, services, or projects compiled by agency personnel, by advisory committees, or by consultants under contract with an agency that are not noted elsewhere in this schedule. Includes reports distributed either internally or to other entities		3				O		



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01.135.10	1.1.068	Reports on Performance Measures	Quarterly and annual reports on agency performance measures submitted to executive and legislative offices	AC	6			AC=September 1st of odd-numbered calendar years			
01.136.10	1.1.069	Activity Reports	Reports compiled by agency personnel on a daily or other periodic basis pertaining to workload monitoring, task completion times, number of public contacts, and similar activities.		1					CAUTION: SEE item number 1.1.064.	
01.137.10	1.1.070	Agency Rules, Policies, and Procedures - Final	Manuals, guidelines, administrative rules, or similar records distributed internally for the use of employees or externally to the public or those individuals or entities regulated by an agency that sets out the rules, policies, and procedures that govern an agency's programs, services, or projects.	AC	3			AC = Completion or termination of programs, rules, policies or procedures.	O	SEE ALSO: Agency Rules, Policies and Procedures - Working Files, item number 1.1.071	



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01.138.10	1.1.071	Agency Rules, Policies, and Procedures - Working Files	Manuals, guidelines, administrative rules, or similar records distributed internally for the use of employees or externally to the public or those individuals or entities regulated by an agency that sets out the rules, policies, and procedures that govern an agency's programs, services, or projects.	AC	3			AC = Completion or termination of programs, rules, policies or procedures.	O	See also item number 1.1.070	
01.139.10	1.1.072	Public Information Reports	Reports made to the Office of the Attorney General on an agency's Public Information Act activities.		2						
01.140.10	1.1.073	Administrative Hearings	Transcripts and final decisions of hearings conducted as part of the regulatory process, and hearings on proposed rules and changes. The records may be maintained with related information including meeting notices, proofs of publication, and meeting minutes.	AC	3			AC = Last action.	O	Note: This applies only to TAMUS agencies with regulatory functions.	
01.141.10	1.1.074	Sunset Review Report and Documentation		AC	3			AC = After the subsequent Sunset Review	O		



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3. Agency Item No.	4. Record Series Item No.	5. Record Series Title	6. Description	7. Ret. Code	8. Retention Period			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
01.142.10	1.1.075	Alternative Dispute Resolutions - Final Agreement	Final agreement described by Government Code §2009.054(c), associated with a matter conducted under an alternative dispute resolution procedure in which personnel of a state agency participated as a party on the agency's behalf.	AC	4			AC = Date of final agreement.			Tex. Civ. Prac. and Rem. Code, § 154.071
01.143.10		Patents and Related Documents		AC	20			AC = Date patent is issued.		CAUTION: If multiple patents are subject to the same license agreement, retain for the longer of the retention period, the termination or expiration of the license agreement, or the latest expiring patent.	
01.143.20		Intellectual Property Agreements	Includes license agreements, know-how agreements, and other contractual agreements resulting from the licensing of intellectual property or the transfer of intellectual property.	AC	7			AC = Termination or expiration of the agreement according to its terms.	O	CAUTION: Does not include patent records. See Agency Item # 01.143.10.	OMB Circular A-110.53 authorized by 31 U.S.C. 503, 31 U.S.C. 1111, 41 U.S.C. 405, and E.O. 11541.



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01.143.30		Miscellaneous Intellectual Property Records	Intellectual property records not covered by Agency Item # 01.143.10 or 01.143.20.		20					Includes disclosures of intellectual property where there was no protection sought or was denied by governmental authority in the relevant country.	
01.144.10		Organizational Memberships		AV							
01.145.10		Gift and Donor Records		PM							
01.200.10	1.2.001	Destruction Authorizations	Agency level documents authorizing final disposition of records under a certified records retention schedule	FE	3						
01.201.10	1.2.003	Forms History File	Print masters of original version and all subsequent revisions to an agency form, including any associated design or design modification requests.	AC	1			AC=Discontinue use of forms			
01.202.10	1.2.004	Forms Inventory	Any periodic listing of all forms used internally or externally by an agency	US							
01.203.10	1.2.005	Records Retention Schedule (Agency copy)	Includes documentation of certification and approval - forms SLR 105C and/or other forms designated by the State Records Administrator.	US						Original is retained permanently by SLRMD of Texas State Library. Record copy retained by Records Management Officer.	



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01.204.10	1.2.006	Records Transmittal Forms (Agency Copy)	Forms indicate records transferred to storage or a transfer of legal custody.	AC	2			AC=Date of authorization for destruction, permanent transfer from storage, or transfer to the Archives and Information Services Division, Texas State Library and Archives Commission, by the agency records administrator.			
01.205.10	1.2.008	Request for Authority to Dispose of State Records	Agency copy of requests seeking authority from Texas State Library and Archives Commission for the final disposition of state records NOT under a certified records retention schedule.	FE	3					Original is retained by the Texas State Library and Archives Commission.	
01.206.10	1.2.010	Records Disposition Logs	Logs or similar records listing records destroyed or transferred to TAMUS system member archives.		10					CAUTION: This item does not include records covered by Agency Item # 01.200.10 or 01.205.10.	
01.207.10	1.2.012	Records Inventory Worksheets		US							
01.208.10	1.2.013	Records Control Locator Aids	Includes indexes, card files, shelf lists, registers, guides, etc.	AC				AC = When control aid is updated, revised, or no longer needed.			



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01.209.10	1.2.014	Records Management Plan		US	1						
01.210.10	1.2.015	Disaster Recovery Service Transmittals (RMD 109)	Also includes documentation for disaster recovery services provided by other entities	FE	1					See Also 5.4.013	
01.211.10	1.2.016	Disaster Recovery Service Approval Form (RMD 113)	Agency Copy of Form	AC				AC=Until superseded or termination of service.			



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01.300.10	1.3.001	State Publications	One copy of each state publication except a publication that is subject to a different retention period in this schedule.	AC	2			AC=Until Superseded or obsolete.	O	CAUTION: Many state publications must be submitted to the Texas State Publications Depository Program, Texas State Library and Archives Commission, by law (Government Code 441.101-441.106). The Texas State Library and Archives Commission will retain a copy of all state publications submitted to it on a continuing basis, subject to periodic evaluation to determine if the publication merits further retention. For those publications meant to be distributed in a first published version without subsequent revision, the date decision is made within an agency to no longer make the publication available for distribution. For serial publications issued in successive parts bearing numerical or chronological designations (e.g., newsletters, annual statistical reports of regulated activities), from the date of release of the next part in the series.	



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01.301.10	1.3.002	Publication Files	Background material, copy (drafts), original artwork, photo negatives, prints, flats, etc. This includes all work performed both inside and outside the agency.	AV					O		
01.400.10		Accreditation Records	This series documents the accreditation process for the colleges, units, and related programs. The series provides a record of materials compiled for inclusion in a report packet sent to the appropriate professional accreditation board for the specific program or service and usually includes statements on mission, finance, educational programs and departments/divisions make up. Most accreditation organizations produce an	PM					O		



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					Years	Months	Days				
1.400.20		Accreditation Records-Working File	This series documents the accreditation process for the colleges, units, and related programs. The series provides a record of materials compiled for inclusion in a report packet sent to the appropriate professional accreditation board for the specific program or service and usually includes statements on mission, finance, educational programs and departments/divisions make up. Most	AC				AC=End of 2 accreditation cycles.			
01.401.10		Completed Class Tests and Examinations, Students' Course Papers		AC	1			AC=Academic term			
01.402.10		Course Syllabus/Outlines Files		AV						CAUTION: If record copy of syllabus is posted electronically on institution website in accordance with Texas Education Code § 51.974, retain at least 2 years.	
01.403.10		Curriculum Files, Including Revisions, Central Administrative		US	5					Review before disposal as some may merit permanent retention for historical reasons.	



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01.404.10		Curriculum Files, including Revisions, Departmental		US	5						
01.405.10		Instructor/Faculty Evaluations	Student evaluations of instructors/faculty.	AC	1			AC=Academic term			
01.406.10		Instructor Grade Books		AC	1			AC=Academic term			
01.407.10		Instructor Grade Sheets		AC	1			AC=Academic term			
01.409.10		New Course Proposals File, Central Administrative		AV							
01.410.10		New Course Proposals File, Departmental		AV							
02.100.10	2.1.001	Processing Files	Machine-readable files used in the creation, utilization, and updating of master files.	AC				AC = Completion of 3rd verification cycle, or audit completion confirming successful transaction processing, or required audit trail maintenance, or the ability to restore or migrate when errors are detected or when hardware or software changes occur.		Caution: Be certain before assigning the retention period of AC to automated processing files that the files do not fall under records series listed elsewhere.	



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02.101.10	2.1.002	Master Files	Relatively long-lived computer files containing organized and consistent sets of complete and accurate electronic records. Examples include, but are not limited to, data tables of relational databases used by applications or computer programs.	AC				AC = Completion of 3rd verification cycle, or audit completion confirming successful transaction processing, or required audit trail maintenance, or the ability to restore or migrate when errors are detected or when hardware or software changes occur.		Caution: Be certain before assigning the retention period of AC to automated processing files that the files do not fall under records series listed elsewhere.	
02.102.10	2.1.007	Software Programs	Automated software applications and operating system files including job control language, program listing/source code, etc.	AC				AC = Until electronic records are transferred to and made usable in a new software environment, or there are no electronic records being retained to meet an approved retention period that require the software to be retrieved and read.		CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.	13 TAC 6.94.



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02.103.10	2.1.008	Hardware Documentation	Records documenting operational and maintenance requirements of computer hardware such as operating manuals, hardware/operating system requirements, hardware configurations, and equipment control systems.	AC				AC = Until electronic records are transferred to and made usable in a new software environment or there are no electronic records being retained to meet an approved retention period that require the software to be retrieved and read.		CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.	13 TAC 6.94.



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02.104.10	2.1.009	Technical Documentation	Records adequate to specify all technical characteristics necessary for reading or processing of electronic records and their timely, authorized disposition including documentation describing how a system operates and necessary for using the system such as user guides, system or sub-system definitions, system specifications, input and output specifications, and system flow charts; program descriptions and documentation such as program flowcharts, program maintenance logs, change notices, and other records that document modifications to computer programs; and data documentation necessary to access, retrieve, manipulate and interpret data in an automated system such as a data element dictionary, file layout, code book or table, and other records that explain the meaning, purpose, structure, logical relationships, and origin of the data elements.	AC				AC = Until electronic records are transferred to and made usable in a new software environment or there are no electronic records being retained to meet an approved retention period that require the software to be retrieved and read.		CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.	13 TAC 6.94.



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02.105.10	2.1.010	Audit Trail Records	Files needed for electronic data audits such as those showing transactions accepted, rejected, suspended, and/or processed; history files/tapes; records of on-line updates to application files or security logs.	AC				AC=All audit requirements have been met.			
02.106.10	2.1.011	Finding Aids, Indexes and Tracking Systems	Automated indexes, lists, registers and other finding aids used to provide access to records.	AC				AC=The related records have been destroyed.		CAUTION: These records must carry the same retention period and archival code of the records they support.	
02.200.10	2.2.001	System Monitoring Records	Electronic files or automated logs created to monitor computer systems such as print spool logs, console logs, tape activity logs, etc.	AV							
02.201.10	2.2.002	Chargeback Records to Data Processing Services Users	Records used to document, calculate costs, and bill program unites for computer usage and data processing services. These records are also used for cost recovery, budgeting, or administrative purposes.	FE	3						



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02.202.10	2.2.004	Computer Job Schedules and Reports	Schedules or similar records showing computer jobs to be run and other reports by computer operators or programmers of work performed.			3					
02.203.10	2.2.010	Data Processing Policies and Procedures	Manuals, guidelines or similar documents establishing data processing policies and procedures in an agency in such areas as access and security, systems development, data retention and disposition, data ownership, production control, system backup, etc.	US	3					CAUTION: Does not include technical documentation of procedures necessary for reading or processing of electronic records. See item number 2.1.009.	
02.204.10	2.2.011	Batch Data Entry Control Records	Forms and logs used to reconcile batches submitted for procession against batches received and processed.	AC				AC = When reconciliation confirmed.			
02.205.10	2.2.012	Output Records for Computer Production (Mini and Mainframe)	Reports showing transactions that were accepted, rejected, suspended, and/or processed.	AV							



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02.206.10	2.2.013	Quality Assurance Records	Information verifying the quality of system, hardware or software operations including records of errors or failures and the loss of data resulting from such failures, documentation of abnormal termination and of error free processing, checks of changes put into production, transaction histories, and other records needed as an audit trail to evaluate data accuracy.	AC				AC=No longer needed as an audit trail for any records modified			
02.207.10	2.2.014	Internet Cookies	Data resident on hard drives that make use of user-specific information transmitted by the Web server onto the user's computer so that the information might be available for later access by itself or other servers	AV						The disposal of Internet cookies need not be documented through destruction authorizations (1.2.001) or in records disposition logs (1.2.010), but agencies should establish procedures governing disposal of these records as part of its records management plan (1.2.014).	



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02.208.10	2.2.015	History Files - Web Sites	A record of the documents visited during an Internet session that allows users to access previously visited pages more quickly or to generate a record of a usage of a state-owned computer.	AV						The disposal of history files need not be documented through destruction authorizations (1.2.001) or in records disposition logs (1.2.010), but agencies should establish procedures governing disposal of these records as part of its records management plan (1.2.014).	
02.209.10	2.2.016	Software Registrations, Warranties and Licensee Agreements		LA	3						
03.100.10	3.1.001	Applications for Permanent Employment - Not Hired	Applications, resumes, transcripts, letters of reference, and similar documents whose submission by candidates for vacant positions is required on the application form, by application procedures, or in the employment ad.		2					Includes Temporary Employment	29 CFR § 1602.31 (State Agencies); 29 CFR § 1602.49(a) (State Universities)



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03.101.10	3.1.002	Applications for Permanent Employment - Hired	Applications, resumes, transcripts, letters of reference, and similar documents whose submission by candidates for vacant positions is required on the application form, by application procedures, or in the employment ad.	AC	5			AC=Termination of Employment		Includes Temporary Employment and Certificate of Age (minor workers)	
03.102.10	3.1.006	Employee Counseling Records	Notes, memoranda, or reports relating to the counseling of an employee for work-related, personal, or substance abuse problems.	AC	3			AC = Termination of Counseling		Period is AC+7 if counseling provided by, and records kept by a licensed psychologist as required by 22 Tex. Admin. Code § 465.22 (d)(2).	
03.103.10	3.1.011	Employee's Insurance Records	Copies of information relating to the selection by employees of life, disability, health, and other types of insurance offered by TAMUS to its employees.	AC				AC = Until superseded or termination of employment.		CAUTION: Documents that serve as payroll deduction authorizations must be maintained for the retention period prescribed for item number 3.2.001	
03.104.10	3.1.012	Employment Opportunity Announcements	Internal or external announcements or advertisements of job openings, promotions, training programs, or opportunities for overtime.		2						29 CFR § 1602.31 (State Agencies) 29 CFR § 1602.49(a) (State Universities)



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03.105.10	3.1.013	Employment Contracts	Executed, renewed, or amended on or after September 1, 2015.	AC	7			AC=Expiration or termination of the contract according to its terms.			Tex. Gov't Code 441.1855
03.105.20	3.1.013	Employment Contracts	Executed, renewed, or amended on or before August 31, 2015.	AC	4			AC=Expiration or termination of the contract according to its			Tex. Gov't Code 441.1855
03.106.10	3.1.014	Employment Selection Records - Hired	Includes notes of interviews with candidates; audio and videotapes of job interviews; background check consent forms and previous injury checks; pre-employment physical examinations; polygraph examination results; and all other records that document the selection process. See 3.1.026 for security clearances on hired applicants.	AC	5			AC=Termination of Employment		CAUTION: Does not include criminal history checks. See item number 3.1.026	



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					Years	Months	Days				
03.106.20		Employment Selection Records - Not Hired	Includes notes of interviews with candidates; audio and videotapes of job interviews; background check consent forms and previous injury checks; pre-employment physical examinations; polygraph examination results; and all other records that document the selection process.		5						
03.107.10	3.1.018	Grievance Records	Records relating to the review of employee grievances against personnel policies, working conditions, etc.	AC	5			AC=Termination of Employment		CAUTION: Does not include formal complaints filed by an employee with the Equal Employment Opportunity Commission or other local, state or federal agency. See Item Number 1.1.048. This item also does not include civil rights complaint records, see Agency Item No. 01.100.30.	
03.108.10	3.1.019	Performance Appraisals		AC	5			AC=Termination of Employment.		See Agency item number 03.108.20 for Faculty performance records.	



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					Years	Months	Days				
03.108.20		Faculty Performance Records (promotion, tenure, post-tenure review)		AC	5			AC=Termination of Employment			
03.109.10	3.1.020	Personnel Corrective Action Documentation	Does not affect pay, status or tenure	AC	5			AC=Termination of Employment		CAUTION: If, during the retention period of this records series, any part of this series is used to document and support personnel disciplinary action under item number 3.1.021, all documentation from this series used to support disciplinary action must be retained for the minimum retention period described by item number 3.1.021.	
03.110.10	3.1.021	Personnel Disciplinary Action Documentation	Affects pay, status or tenure	AC	5			AC=Termination of Employment			29 CFR 1602.49(a).



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					Years	Months	Days				
03.111.10	3.1.022	Personnel Information or Action Form	Forms or similar records used to create or change information concerning the records of an employee including pay grade, position classification, employee number, evaluation date, and termination of employment.	AC	5			AC=Termination of Employment		Form 500	
03.112.10	3.1.023	Position/Job Descriptions	Job descriptions, including all associated task or skill statements, for positions in agency.	AC	5			AC=Termination of Employment			40 TAC 815.106(i).
03.114.10	3.1.024	Physical Examinations/Medical Reports	Medical or physical examination reports or certificates of employees for whom periodic monitoring of health or fitness is required.	AC	2			AC = Until superseded or termination of employment.		CAUTION: Does not include pre-employment physical examinations. See item number 3.1.014	
03.114.20		Alcohol and Controlled Substance Testing and Prevention programs		AC				AC=In accordance with applicable federal requirements.			



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03.115.10	3.1.026	Criminal History Checks	Criminal history record information on job applicants or agency employees.	AC				AC = The criminal history record has served the immediate purpose for which is obtained.		NOTE: See agency item numbers 03.106.10 and 03.106.20 for criminal history background check consent forms. CAUTION: An agency that is authorized to obtain a criminal history record information from DPS must refer to its agency's legislation or see Subchapter F, Chapter 411, Government Code for appropriate retention and use of this information.	
03.116.10	3.1.027	Training and Educational Achievement Records (Individual)	Certificates of completion, transcripts, test scores, or similar records documenting the training, testing, or continuing education achievements of an employee.	AC	5			AC=Termination of Employment			



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					Years	Months	Days				
03.117.10	3.1.029	Documentation or Verification of Employment Eligibility	Federal reporting form (INS I-9)	AC	1			AC=Termination of Employment		CAUTION: Federal regulation requires that INS I-9 forms be retained for 3 years from date of hire or 1 year after separation of the employee, whichever is later. Agencies should make certain that the INS I-9 forms for employees who terminate from an agency less than 3 years from date of hire are kept for the 3 year retention period.	8 CFR § 274a.2 (b)(2)(i)(A), (c)(2)
03.118.10	3.1.031	Employee Benefits - Other than Insurance	Agency copies of information relating to the selection of available benefit options other than insurance	AC	2			AC = Until superseded or termination of employment.		Caution: Documents that serve as payroll deduction authorizations must be maintained for the retention period prescribed for item number 3.2.001.	
03.119.10	3.1.034	Resumes - Unsolicited	Retention period applies if replies are made to the sender of resume stating that it will be kept on file for future job openings.	AV						See item number 3.1.014 for resumes, whether solicited or unsolicited, that are used in any way in the employment selection process.	



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03.120.10	3.1.035	Performance Bonds	Bonds posted by employees and individuals or entities under contract with an agency for the performance of the duties of a position or the terms of a contract with the agency. <u>Executed, renewed, or amended on or after September 1, 2015.</u>	AC	7			AC=Expiration or termination of the bond according to its terms		CAUTION: Does not include construction or architectural surety bonds. See item number 5.2.028. See related item 5.1.001 Contracts and Leases.	Tex. Gov't Code 441.1855.
03.120.20	3.1.035	Performance Bonds	Bonds posted by employees and individuals or entities under contract with an agency for the performance of the duties of a position or the terms of a contract with the agency. <u>Executed, renewed, or amended on or before August 31, 2015.</u>	AC	4			AC=Expiration or termination of the bond according to its terms		CAUTION: Does not include construction or architectural surety bonds. See item number 5.2.028. See related item 5.1.001 Contracts and Leases.	Tex. Gov't Code 441.1855.



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03.121.10	3.1.036	Apprenticeship Records	Summary of applicant qualifications, evaluation basis for selection or rejection, original applications, job assignments, promotions, separations, layoffs, terminations, compensation records, conditions of work, time records, hours of training provided (separate from labor), minority status, and gender of all selected and rejected applicants.		5						29 CFR § 30.8(e).
03.122.10	3.1.037	Employee Recognition	Awards, incentives, tenure, etc.	AC	5			AC=Termination of Employment			
03.123.10	3.1.038	Public Access Option Form	Form completed and signed by employee or official or former employee or official, electing to keep home address, home telephone number, social security number, and family information open or confidential under the Public Information Act, Government code 552.024.	US						See item number 3.3.011	



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					Years	Months	Days				
03.124.10	3.1.039	Ombudsman Records	Consultation records, notes, letters, memos, emails, reports and other documentation	AC				AC = Final decision or matter closed.		Caution: Does not include formal complaint filed with EEO. If matter becomes a grievance or the subject of counseling or litigation, or employee is subject to disciplinary action, the records that are subject to retention are the appropriate records series. SEE 1.1.048, 3.1.018, 3.1.020, and 3.1.021.	
03.200.10	3.2.001	Employee Deduction Authorization	Documentation used to start, modify, or stop all voluntary or required deductions from payroll, including garnishment or other court-ordered attachments.	AC	4			AC=After termination of employee or after amendment, expiration, or termination of authorization, whichever is sooner			
03.201.10	3.2.002	Employee Earning Records		AC	5			AC= End of calendar year of termination of employment.			40 TAC 815.106(i).
03.202.10	3.2.003	Federal Tax Records	1099, W-2, and other tax records.	AC	4			AC = Tax due date, date claim is filed, or date tax is paid whichever is later.			26 CFR § 31.6001-1(e)(2)



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03.203.10	3.2.004	Income Adjustment Authorization	Used to make increases or decreases to employees' gross pay, FICA, retirement, or in the computation of taxes.		2						29 CFR § 516.6(c)
03.204.10	3.2.005	W-4 Forms	Employer's copy of "Employees' Withholding Exemption Certificate."	AC	4			AC = Until superseded, obsolete, or upon separation of employee.			26 CFR § 31.6001-1 (e) (2)
03.205.10	3.2.006	Wage Rate Tables			2						29 CFR § 516.6(a)(2)
03.206.10	3.2.007	Unemployment Compensation		AC	5			AC = Settled			
03.207.10	3.2.008	Direct Deposit Applications/Authorization		US							
03.208.10	3.2.009	State Deferred Compensation Records		AC	5			AC=All accounts with a vendor or vendors for the individual participant have been closed		For instruction regarding the determination of the closure of accounts and for additional information regarding the retention period see the most current edition of the <i>Benefits Coordinator Reference Manual</i> issued by the Employees Retirement System of TX.	



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					Years	Months	Days				
03.209.10	3.2.010	Human Resource Information System (HRIS)	Reports and supporting documentation.	AC	4						
03.300.10	3.3.001	Affirmative Action Plans	For both regular employees and apprenticeship programs		5					For apprenticeship plans.	29 CFR § 30.12(d).
03.301.10	3.3.004	Benefit Plans	Employee benefit plans such as pension, life, health, and disability insurance; deferred compensation; etc., including amendments.	US	1						29 CFR § 1627.3(b)(2)
03.302.10	3.3.010	Labor Statistics Report	Reports providing statistical information on labor force.		3						
03.303.10	3.3.011	Former Employee Verification Records	Minimum information needed to verify employment includes name, SSN, exact dates of employment, last known address and most recent public access option form.	AC	75			AC=Termination of Employment.		See item number 3.1.038	
03.304.10	3.3.015	Positions/Job Classification Review File	Records relating to review and monitoring of job classifications within an agency.	US	3						
03.305.10	3.3.020	Work Schedules/Assignments	Work, duty, shift, crew, or case schedules, rosters, or assignments.		2						



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					Years	Months	Days				
03.306.10	3.3.022	Texas Workforce Commission (TWC)	Reports from TWC to the agency or its predecessor pertaining to employees.		3						
03.307.10	3.3.023	Reimbursable Activities, Requests and Authorizations in which to Engage	Request and authorizations for travel; participation in educational programs, workshops, or college classes; or for other work-related activities for which the expenses of the employee are defrayed or reimbursed.	FE	3					Includes request for tuition assistance.	
03.307.20		External Employment/Consulting	Includes requests for approval, authorizations, internal disclosures related to such activities.	FE	3						
03.308.10	3.3.024	Personnel Policies and Procedures	Any internally distributed manuals, guidelines, or similar records that define agency wide policies and procedures concerning the personnel of an agency	US	3						
03.309.20	3.3.025	Job Procedure Records	Any documents detailing the procedural duties and responsibilities of agency positions on a position-by-position basis.	US	3						



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03.310.10	3.3.026	Agency Staffing Reports	Any reports compiled by an agency on aspects of personnel staffing, including listings of all staff by program or name, staff hired during a month, detailed listings of employees within its organizational structure, position vacancies, analyses of turnover rates and seasonality of employment, etc.	US	3						
03.311.10	3.3.027	Aptitudes & Skills Tests and Test Papers	Aptitude or skills tests required of job applicants or of current personnel to qualify for promotion or transfer.	US	2					Caution: One copy of each different test (different in terms of either questions or administration procedures) should be retained for the period indicated.	29 CFR 1602.31(a) (State Agencies) 29 CFR 1602.49(a) (State Universities)
03.312.10	3.3.029	Aptitude and Skills Test (Validation Records)		AC	2			AC = As long as the test is used by an agency			29 CFR § 1602.31 (State Agencies) 29 CFR § 1602.49(a) (State Universities)
03.313.10	3.3.030	Training Administration Records		US	2					Caution: Does not include hazardous material training records. See item number 5.4.007.	



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03.314.10	3.3.031	EEO Reports and Supporting Documentation	Includes documentation used to complete EEO reports		3						29 CFR § 1602.32, 48 and 50
03.315.10	3.3.032	Equal Pay Records	Reports, studies, aggregated or summary data and similar documentation compiled to monitor and demonstrate compliance with the federal Equal Pay Act.		3						29 CFR § 1620.32
03.400.10	3.4.001	Accumulated Leave Adjustment Request	Used to create employee leave balances, to transfer leave balances when an employee transfers positions, to adjust carry-over balances on August 31, to correct errors on leave accumulation, and to close out leave accounts on separated employees.		4						
03.401.10	3.4.002	Leave Status Report (each pay cycle)	Cumulative report is issued pay cycle and provides employee leave status information for each position.		4						
03.402.10	3.4.003	Less Than Full-Time Worked	Dates and hours.		4						40 Tex. Admin. Code § 815.106(i)
03.403.10	3.4.004	Overtime Authorizations			2						
03.404.10	3.4.005	Overtime Schedules			2						



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03.405.10	3.4.006	Time Cards and Time Sheets			4						40 Tex. Admin. Code § 815.106(i)
03.406.10	3.4.007	Time Off and/or Sick Leave Requests			4					Includes supporting documentation for leave requests, such as physician statements.	
03.407.10	3.4.008	Sick Leave Pool Records	Donations and Withdrawals		4						
03.500.10		J-1 Student Intern Evaluations (Applicable to J-1 student interns)		AC	3			AC= completion of student intern program.			22 C.F.R. § 62.23(i)(5)
03.501.10		Labor Condition Applications and Public Inspection Files (H-1Bs and E-3s)		AC	1			AC= earliest of the following termination of employment under labor condition application, date employee has obtained permanent residence, or date labor condition application expired or withdrawn.			20 C.F.R. § 655.760(c)



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					Years	Months	Days				
03.502.10		Payroll Records (H-1Bs and E-3s)			3					Retention period begins on date of record's creation unless an enforcement action is commenced, then records must be kept in accordance with federal regulations.	20 C.F.R. § 655.760(c)
03.503.10		Application for Permanent Employment Certification	Including all supporting documentation	AC	5			AC= date of filing.			20 C.F.R. § 656.10(f)
03.504.10		F-1 Optional Practical Training Records		AC	1			AC= termination of employment.			
03.505.10		O-1s, TNs, J-1s		AC	3			AC=date status ends.		Not including J-1 Student Intern Evaluations, see agency number 03.500.10.	
03.506.10		I-140 Immigration Petitions		AC	5			AC=date of acquiring permanent residence or termination.			
03.507.10		Application for Appointment as a Visiting Scholar		AC	5			AC= date application rejected or termination of appointment.			
04.100.10	4.1.001	Accounts Payable Information		FE	3						



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04.101.10	4.1.002	Billing Detail		FE	3					CAUTION: Does not include long distance telephone billing detail. See item numbers 5.5.001, 5.5.006, and 5.5.007.	
04.102.10	4.1.003	Cancelled Checks/Stubs/Warrants/Drafts		FE	3						
04.103.10	4.1.004	Encumbrance Detail		FE	3						
04.104.10	4.1.005	Inventory and Other Cost Files	Production, job labor quotes, pricing, specifications, etc.	FE	3						
04.105.10	4.1.006	Investment Transaction Files		FE	3						
04.106.10	4.1.007	Transfers or Budget Revisions	Transfers or adjustment to budgets	FE	3						
04.107.10	4.1.008	Electronic Fund Transfers - Direct Deposit Registers		FE	3						
04.108.10		Credit/Debit Card Merchant Receipt		AC				AC = expiration of dispute resolution period.			
04.200.10	4.2.001	Cash Deposit Vouchers	Including deposit slips	FE	3						
04.201.10	4.2.002	Cash Receipts	Includes receipts for fees (permits, licenses, renewals, etc.).	FE	3						
04.202.10	4.2.003	Daily Cash Receipts Log		FE	3						



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04.203.10	4.2.004	Encumbrance Vouchers	Orders, statements, change orders, etc.	FE	3						
04.204.10	4.2.005	Purchase Vouchers	Requisitions, receiving reports, invoices, or statements, change orders, best value determination etc.	FE	3						
04.205.10	4.2.006	General Journal Vouchers		FE	3						
04.206.10	4.2.007	Expenditure Vouchers	Includes travel expense reports, payroll, etc.	FE	3					Includes Credits	
04.300.10	4.3.001	Sales Journals or Registers		FE	3						
04.301.10	4.3.002	Receipts Journals or Registers		FE	3						
04.302.10	4.3.003	Expenditures Journals or Registers		FE	3						
04.400.10	4.4.001	General and Subsidiary Ledgers		FE	3						
04.401.10	4.4.002	Accounts Receivable Ledgers		FE	3						
04.402.10	4.4.003	Accounts Payable Ledgers		FE	3						
04.403.10	4.4.004	Employee Savings Bond Ledgers		FE	3						



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					Years	Months	Days				
04.500.10	4.5.001	Worksheets for Preparing Fiscal Reports		FE	3						
04.501.10	4.5.002	Internal Fiscal Management Reports	Includes monthly budget reports.	FE	3						
04.502.10	4.5.003	Annual Financial Report	Required by General Appropriations Act.	AC	6			AC=September 1st of odd-numbered calendar years		Agency retains Record Copy and sends required number of copies to Publications Depository Program-TSL	
04.503.10	4.5.005	External Fiscal Reports - Special purpose	Federal financial reports, salary reports, etc. Includes HUB Reports.	FE	3						
04.504.10	4.5.006	Annual Operating Budget	Required by the General Appropriations Act	FE	3						
04.505.10	4.5.007	USAS Reports - Daily		AC				AC = Receipt and reconciliation of monthly report.			
04.506.10	4.5.008	USAS Reports - Monthly		AC				AC = Receipt and reconciliation of annual report.			
04.507.10	4.5.009	USAS Reports - Annual		FE	3						
04.600.10	4.6.001	Balancing Records		FE	3						
04.601.10	4.6.002	Reconciliations		FE	3						
04.602.10	4.6.003	Cash Counts		FE	3						



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04.700.10	4.7.001	Accounting Policies and Procedures Manual		US	3						
04.701.10	4.7.002	Bank Statements		FE	3						
04.702.10	4.7.003	Returned Checks/Warrants/Drafts (Uncollectible)		AC	3			AC=After deemed uncollectible			
04.703.10	4.7.004	Capital Asset Records		LA	3						
04.704.10	4.7.005	Claim Files		AC	3			AC = Resolution of Claim			
04.705.10	4.7.006	Comptroller Statements		FE	3						
04.706.10	4.7.007	Detail Chart of Accounts	One for all accounts in use for a year.	FE	3						
04.707.10	4.7.008	Grant Records	This series documents state and federal grant projects participated in or administered by state agencies. It includes grant authorization records, which provide evidence of the award of grants to or by agencies; grant/project financial or performance reports, which are periodic reports of financial activity and/or program performance and supporting information related to grants received or made by agencies.	AC	3			AC = Satisfaction of all Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments (the Common Rule)		For research agreements (grants, cooperative agreements, contracts), retain in accordance with Agency Item # 07.101.20. CAUTION: Retention requirements may vary depending on the specific funding agency. Agencies must ensure that records are retained for the appropriate retention period.	



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					Years	Months	Days				
04.708.10	4.7.009	Fixed Asset Sequential Number Log		US	3						
04.709.10	4.7.010	Long-Term Liability	Bonds, etc.	AC	3			AC=Retirement of debt			
04.711.10	4.7.012	Signature Authorizations	Signature cards or similar records establishing authority of an agency employee to initiate or authorize financial transactions on behalf of an agency.	AC	3			AC = US + FE		Includes employee application for procurement/payment card, travel card or other similar methods of payment for goods and/or services.	



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					Years	Months	Days				
05.100.10	5.1.001	Contracts and Leases	Contracts, leases, and agreements include general obligation, land lease, utilities, and construction except for buildings. Documents include specifications, affidavits of publication of calls for bids, performance bonds, contracts, purchase orders, inspection reports, <u>Executed, renewed, or amended on or after September 1, 2015.</u>	AC	7			AC=Expiration or termination of the instrument according to its terms.		See related item numbers 3.1.035 Performance Bonds and 5.3.007 Bid Documentation. See item number 5.2.028 for building construction contracts and item number 5.1.017 for contract logs. Does not include research agreements. See Agency Item #. 07.101.20.	Tex. Gov't Code 441.1855.



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					Years	Months	Days				
05.100.20	5.1.001	Contracts and Leases	Contracts, leases, and agreements include general obligation, land lease, utilities, and construction except for buildings. Documents include specifications, affidavits of publication of calls for bids, performance bonds, contracts, purchase orders, inspeand correspondence. May also include other applicable documentation in the master contract file per Texas Comptroller of Public Accounts Contract Management Guide. <u>Executed, renewed, or amended on or before August 31, 2015.</u>	AC	4			AC=Expiration or termination of the instrument according to its terms.		See related item numbers 3.1.035 Performance Bonds and 5.3.007 Bid Documentation. See item number 5.2.028 for building construction contracts and item number 5.1.017 for contract logs. Does not include research agreements. See Agency Item #. 07.101.20.	Tex. Gov't Code 441.1855.
05.101.10	5.1.003	Delivery Reports			2						
05.102.10	5.1.004	Mailing and Telecommunications Listings	Any mailing address, telephone or fax number, or e-mail address records maintained by an agency on its employees or on entities or persons it serves.	US							
05.103.10	5.1.005	Postage Records	Records and reports of postage expenses, including postage meter use	FE	3					Includes express delivery and campus post offices.	



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					Years	Months	Days				
05.104.10	5.1.007	Requisitions for In-House Copy/Inter-Agency/Printing Service	Includes word processing and data processing	AV							
05.105.10	5.1.010	Licenses & Permits for Non-Vehicles	Does not include licenses and permits issued by an agency as part of its statutory responsibilities.	AC	2			AC = Expiration date of license or permit.			
05.106.10	5.1.011	Photocopier and Telefax Use Logs & Reports		AV							
05.107.10	5.1.012	Charge Schedules/Price Lists	Schedules of prices charged by an agency for services to the public or other agencies, including any documentation used to determine the charges.	US	3						
05.108.10	5.1.013	Insurance Policies	For vehicles, equipment, etc. <u>Executed, renewed, or amended on or after September 1, 2015.</u>	AC	7			AC=Expiration or termination of the policy according to its terms			Tex. Gov't Code 441.1855
05.108.20	5.1.013	Insurance Policies	For vehicles, equipment, etc. <u>Executed, renewed, or amended on or before August 31, 2015.</u>	AC	4			AC=Expiration or termination of the policy according to its terms			Tex. Gov't Code 441.1855



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					Years	Months	Days				
05.109.10	5.1.014	Office Procedures	Any internally distributed manual, guidelines, or similar records that establish standard office procedures for an agency; for example, agency style manuals, telephone protocols, mail room procedures, print shop and photocopy ordering instructions.	US	1						
05.110.10	5.1.015	Correspondence Tracking Records	Any record created by an agency to track any type of incoming and outgoing correspondence or packages by the U.S. Postal Service or by private couriers.		1						
05.111.10	5.1.017	Contract Log	List of agency contracts, leases, and agreements including general obligation, land lease, utilities, and construction contracts.	FE	3						
05.200.10	5.2.001	Appraisals - Building or Property		AV					O		
05.201.10	5.2.002	Building Construction Project Files	Planning, design, and construction records; accepted and rejected bids; correspondence; etc.	AC	10			AC=Completion of project.	O	See also item numbers 5.2.003 and 5.2.028.	
05.202.10	5.2.003	Building Plans & Specifications - Leased	Includes architectural and engineering drawings, profiles and blueprints.	AC	2			AC=Termination or cancellation of lease	O	See also item numbers 5.2.002 and 5.2.028.	



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					Years	Months	Days				
05.203.10	5.2.003	Building Plans & Specifications - State-Owned	Includes architectural and engineering drawings, profiles and blueprints.	LA					O	See also item numbers 5.2.002 and 5.2.028. ARCHIVES NOTE: Archival review designation is for state-owned buildings only.	
05.204.10	5.2.004	Building Space Requests			1						
05.205.10	5.2.005	Calibration Records (Equipment or Instrument)			10						
05.206.10	5.2.006	Certificate of Destruction of Property		FE	3						
05.207.10	5.2.007	Damage Reports		FE	3						
05.208.10	5.2.008	Equipment History File	Includes requests for installation, moves, service, etc.; and service/repairs logbooks, etc.	LA	3					Includes IT hardware/software maintenance records. For service agreements or contracts related to equipment repairs and service, retain in accordance with item number 5.1.001.	
05.209.10	5.2.009	Equipment Inventory Detail Report Form	Updates agency portion of the inventory listing and adds, changes, transfers, or deletes items from inventory.	FE	3						



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					Years	Months	Days				
05.210.10	5.2.010	Equipment Manuals		LA							
05.211.10	5.2.011	Equipment Warranties		AC	1			AC = Expiration of Warranty.			
05.212.10	5.2.012	Estimate Files (Supply & Repair Cost Estimates)			1						
05.213.10	5.2.014	Inventory - Annual Physical		FE	3						
05.214.10	5.2.015	Notice of Equipment Removed From Inventory		FE	3						
05.215.10	5.2.016	Inventory System Update Listing	Listing shows all additions, changes, deletions, and transfer times for the monthly processing period.	AC				AC=until transfer of information onto annual listing			
05.216.10	5.2.017	Lost and Stolen Property Report		FE	3						
05.217.10	5.2.018	Quality Control Reports			2						
05.218.10	5.2.019	Service Orders	Agency copy of forms completed by mechanical service personnel for installation or repair. Includes billing code, service, labor, parts, and remarks.		1						
05.219.10	5.2.020	Supply Usage Records		FE	1						
05.220.10	5.2.021	Surplus Property Sale		FE	3						



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					Years	Months	Days				
05.221.10	5.2.022	Utility Reports		AV						Includes Energy Management Reports	
05.222.10	5.2.023	Year-to-Date Activity (Inventory Listing)	Shows additions, changes, transfers, and deletions of information within the inventory system. Data include agency, division, tag number, batch, document, transaction date, location, item code, description, date, and cost.	FE	3						
05.223.10	5.2.024	Material Specifications		AC	2			AC = Material is no longer in the agency.			
05.224.10	5.2.025	Equipment Descriptions and Specifications		AC	2			AC = Equipment is no longer in the agency.			
05.225.10	5.2.026	Facilities Reservation Logs			2					From date of event.	
05.226.10	5.2.027	Space Utilization Reports		AV							
05.227.10	5.2.028	Building Construction Contract & Inspection Records	Building construction contracts, surety bonds, and inspection records	LA	10				O	See also item numbers 5.2.002 and 5.2.003	
05.229.10		Facilities Inventory		LA	2						
05.300.10	5.3.002	Freight Bills Paid		FE	3						
05.301.10	5.3.003	Freight Claims		AC	2			AC=Resolution of claim			



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05.302.10	5.3.004	Orders - Acknowledgments		AV							
05.303.10	5.3.005	Packing Slips		AV							
05.304.10	5.3.007	Bid Documentation	Includes bid requisitions/authorizations, invitations to bid or propose, bid specifications, successful and unsuccessful bids, and bid tabulations/evaluations. <u>Associated with a contract executed, renewed, or amended on or after September 1, 2015.</u>	AC	7			AC=Expiration or termination of the instrument according to its terms of decision not to proceed with the bid.			Tex. Gov't Code 441.1855.
05.304.20	5.3.007	Bid Documentation	Includes bid requisitions/authorizations, invitations to bid or propose, bid specifications, successful and unsuccessful bids, and bid tabulations/evaluations. <u>Associated with a contract executed, renewed, or amended on or before August 31, 2015.</u>	FE	3						



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05.304.30	5.3.007	Bid Documentation	Includes bid requisitions/authorizations, invitations to bid or propose, bid specifications, successful and unsuccessful bids, and bid tabulations/evaluations. <u>Unsuccessful bids that do not meet agency submission requirements and are not included in bid evaluation process (e.g. withdrawn, missed submission deadline, incomplete submission, etc.).</u>	AC	2			AC= Date of notification of denial or date of withdrawal, as applicable.			
05.305.10	5.3.008	Purchasing Logs	Log, register, etc., providing a record of purchase orders issued, orders received, and similar data on procurement status.	FE	3						
05.306.10	5.3.009	Requests for Information	Requests for information preliminary to the procurement of goods or services by direct purchase or bid.	AC				AC=Decision not to proceed with the procurement.		CAUTION: If the request for information leads to request for proposal or bid, the request for information should be retained in accordance with item number 5.3.007.	



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					Years	Months	Days				
05.400.10	5.4.001	Accident Reports and Associated Documentation	Accident or occupational disease reports (by supervisors and employees) and other associated reports required to be submitted to the Texas Department of Insurance or its predecessors or maintained internally on accident frequency.	CE	5					The Texas Department of Insurance retains copies of the reports submitted to it for 50 years.	29 CFR 1904.33.
05.401.10		Workers' Compensation Claim Files		AC				AC=Death of Claimant.		Files maintained by System Workers' Compensation Office. The Texas Department of Insurance's copy is retained an additional 50 years.	
05.402.10	5.4.002	Evacuation Plans		US							
05.403.10	5.4.003	Inspection Records	Fire, safety, and other inspection records of facilities and equipment.	AC	3			AC=Inspection or date of the Correction of the Deficiency, if the Inspection Report Reveals a Deficiency.		CAUTION: Does not include inspection reports of building construction. See item number 5.2.028.	
05.404.10	5.4.004	Fire Orders	Issued by Fire Marshal to correct fire code deficiencies.	AC	3			AC=Deficiency corrected			
05.405.10	5.4.007	Hazardous Materials Training Records			5						Texas Health and Safety Code §502.009(g)



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					Years	Months	Days				
05.406.10	5.4.008	Hazard Communication Plans		US	5						Texas Health and Safety Code §502.009(g)
05.407.10	5.4.009	Workplace Chemical Lists			30						Texas Health and Safety Code §502.005 (d)
05.408.10	5.4.010	Material Safety Data Sheets		AC				AC = After sheets are updated or hazardous chemical no longer stored by agency, as applicable			
05.409.10	5.4.011	Visitor Control Registers	Logs, registers, or similar records documenting visitors to limited access or restricted areas of facilities.		3						
05.410.10	5.4.012	Security Access Records	Records relating to the issuance of keys, identification cards, building passes, passwords, signed statements or similar instructions of access to agency facilities, equipment or automated systems.	AC	2			AC=Until superseded, date of expiration, or date of termination, whichever sooner			
05.411.10	5.4.013	Disaster Preparedness and Recovery Plan		US							
05.500.10	5.5.001	Billing Detail - Telecommunication (Other Than TEX-AN)	In addition to summary detail, includes any accompanying detailed listing of long distance calls.	FE	3					See item number 5.5.006 for TEX-AN billing detail.	



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05.501.10	5.5.002	Long Distance Telephone Log (includes Wire Transfers)	Long distance logs created by departments for internal documentation purposes. Includes any similar logs created for long distance facsimile or electronic transmissions.	AV							
05.502.10	5.5.003	Station Activity Reports	Internal listing of incoming/ outgoing telephone activity to individual telephone stations.	AV							
05.503.10	5.5.004	System Activity Reports	Internal listing of all incoming/outgoing agency telephone activity.	AV							
05.504.10	5.5.006	Billing Detail - Telecommunications (TEX-AN)	Applies only to TEX-AN billing detail received by an agency from the GSC BEFORE June 1, 1994. Includes any accompanying detailed listing of long distance calls. See 5.5.001 for billing detail from carriers other than TEX-AN.	FE	3					See item number 5.5.001 for billing detail from carriers other than TEX-AN.	
05.505.10	5.5.007	Disputed Call Documentation	Documentation relating to disputed long distance calls, including documents evidencing repayment by employees for personal long distance use.	FE	3						



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05.600.10	5.6.001	Airplane Flight Logs (State-owned)		LA	3					Includes similar records for vessels, if applicable.	
05.600.20	5.6.001	Airplane Flight Logs (Leased)		FE	3					Includes similar records for vessels, if applicable.	
05.601.10	5.6.002	Airplane Passenger Lists		FE	3					Includes similar records for vessels, if applicable.	
05.602.10	5.6.003	Inspection Repair & Maintenance Records - Vehicles		LA	1					For TAMUS aircraft, maintained in Aircraft Log Books which remain in aircraft. Copies are maintained with vouchers. Includes similar records for vessels, if applicable.	
05.603.10	5.6.004	License and Driving Record Check		AC				AC = Until superseded or until termination of employment			
05.604.10	5.6.005	Vehicle Use Reports	Includes mileage, fuel/oil consumption, passengers carried and other related operational information.	FE	3					For TAMUS aircraft, maintained in combined form with the Airplane Passenger Lists and Mileage Report. Includes similar records for vessels, if applicable.	
05.605.10	5.6.007	Vehicle Titles and Registrations		LA						Includes similar records for vessels, if applicable.	



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05.606.10	5.6.008	Pilot License Verification		AC	5			AC=Termination of Employment			
05.607.10	5.6.009	Parking Permits or Assignments		US							
05.700.10		Accident Reports File	Records relating to traffic accidents, including accident reports, supplemental accident reports, photographs, correspondence and related documentation.	AC	2			AC=Settled.		If as a result of an accident, a person is arrested for a Class B misdemeanor offense or above, retain in accordance with Agency Item # 05.701.10. For a Class C misdemeanor offense arrest or citation, retain in accordance with Agency Item # 05.704.10.	
05.701.10		Arrest File (Class B Misdemeanor Offenses and above)		AC	10			AC=Cleared by conviction, acquittal or dismissal. University police departments may retain longer as required by internal department policies/procedures.		For Class C citations and arrests, see Agency Item # 05.704.10.	
05.702.10		Building Security Reports/File			2						
05.703.10		Campus Security Reports			2					Not including Clery reports. See Agency Item # 05.706.10.	



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05.704.10		Class C Misdemeanor Offense Arrests and Citations		AC	6			AC=Cleared by conviction, acquittal or dismissal.		If a higher charge is also applied to incident, retain in accordance with Agency Item # 05.701.10.	
05.706.10		Clery Annual Security Reports		CE	3				O		20 U.S.C. § 1092(f); 34 C.F.R. § 668.24, 668.46.
05.706.20		Clery Crime Statistics Data		CE	6					All supporting records used in compiling each Clery annual security report, including but not limited to, copies of crime reports; the daily crime logs; records for arrests and referrals for disciplinary action; timely warning reports; related correspondence and notices. See also Agency Item # 05.706.10.	20 U.S.C. § 1092(f); 34 C.F.R. § 668.24, 668.46.
05.707.10		Parking Violation Reports			5						
05.708.10		Police Call Sheets			2						
05.709.10		Police Dispatcher Logs			2						
05.710.10		Police Incident Reports		CE	3						



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05.800.10		Real Estate, Owned	Purchase contracts, gift agreements, deeds, wills, codicils, estate inventories, probate records, minute orders (authorizing purchase, gift or sale of a portion of the asset), restrictions, judgments, closing documents, surveys, maps, plats, property descriptions, appraisals, broker’s opinions of value, property condition reports, inspection reports, geotechnical studies, archeological studies, hydrology studies, ADA compliance reports, habitat and endangered species studies, and related documents and correspondence.	AC	5			AC=For so long as the real estate asset is owned.	O		
05.801.10		Land Management	Commercial and agricultural leases, easements, permits, licenses, minute orders for leases and easements, lease assignments, accounting records, tax assessment/statement/payment/exemption records, and related documents and correspondence.	AC	5			AC=Expiration or Termination of the Instrument according to its terms.			



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05.802.20		Mineral Management Records	Mineral deeds, oil and gas leases, proposed drilling programs, general land office statements, production statements, royalty payment records, pooling agreements, mineral lease assignments, division orders, minute orders, seismic permit records, well logs, notices of auction, bid forms, and related mineral documents and correspondence.	AC	5			AC=For so long as the mineral asset is owned.			
05.803.10		Environmental Assessments, Title Policies, and Opinions of Title.		PM							
06.100.10		Applicants Who Do Not Enter		AC	1			AC=Application term		Includes transcripts, acceptance letters, advanced placement records, applications for admission, correspondence, entrance examination reports, letters of recommendation, medical records, placement scores, readmission forms, test scores.	



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06.100.20		Documents for Applicants Who Enter		AC	5			AC=Graduation or date of last attendance		Includes transcripts, acceptance letters, advanced placement records, applications for admission & readmission, correspondence, entrance examination reports, medical records, placement scores, residency classification forms, test scores.	
06.101.10		Letters of Recommendation		AC				AC=After student (applicants who enter) is admitted		Waivers of rights of access filed with letters of recommendation should be retained as long as the file is retained.	
06.102.10		Recruitment Materials	Applicants who enter.	AC				AC=After enrollment of student			
06.102.20		Recruitment Materials for Veterans			3					VA Regulations	
06.103.10		Scholarship Applications		AC	1			AC=Date of award			



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					Years	Months	Days				
06.200.10		Miscellaneous Academic Records		PM						Applicable to academic records not covered by other items and/or determined by the institution to have historical value.	
06.201.10		Academic Action Authorizations	Dismissal, etc.	AC	5			AC=Graduation or date of last attendance			
06.202.10		Advanced Placement Records		AC	5			AC=Graduation or date of last attendance.			
06.203.10		Applications for Graduation		AC	1			AC=Graduation or date of last attendance			
06.204.10		Duplicate Diploma Requests		AC	1			AC=Date submitted			
06.205.10		Applications for Admission or Readmission (Accepted)		AC	5			AC=Graduation or date of last attendance			
06.206.10		Academic Progress Audit Authorizations		AC	1			AC = Date submitted			
06.207.10		Changes of Course (add/drop)		AC	1			AC=end of academic term			
06.208.10		Change of Grade Forms (update documents)		AC	1			AC=Date submitted.			



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					Years	Months	Days				
06.209.10		Class Lists (original grade sheets)		AC	1			AC=Closed			
06.210.10		Class Schedules (students)		AC	1			AC=Graduation or date of last attendance			
06.211.10		Correspondence, Relevant to Students' Registration and Data Documents		AC	5			AC=Graduation or date of last attendance			
06.212.10		Course Inventory Data File			5						
06.213.10		Credit by Examination Forms		AC	5			AC=end of term credit is awarded or denied.			
06.214.10		Credit/No Credit Approvals		AC	1			AC=Date submitted			
06.215.10		Curriculum Change Authorizations		AC	5			AC=Graduation or date of last attendance			
06.216.10		Degree Audit Records		AC	5			AC=Graduation or date of last attendance			
06.217.10		Degree Audit Request Forms		AV							
06.218.10		Disciplinary Action Documents	Routine and advance disciplinary actions including dismissal, suspension, blocked from reenrollment, etc.	AC	5			AC=Graduation or date of last attendance			



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06.219.10		Fee Assessment Forms		AC	5			AC=Graduation or date of last attendance			
06.220.10		Financial Aid Audit Documents		AC	3			AC= After annual audit accepted by Department of Education			
06.221.10		Foreign Student Forms	I-20, etc.	AC	5			AC=Graduation or date of last attendance			
06.222.10		Grade Reports	Registrar's copies.	AC	1			AC=Distribution			
06.223.20		Graduation Lists		PM					I	Master microfilm copy stored in archives	
06.224.10		Graduation Authorizations		AC	5			AC=Graduation or date of last attendance			
06.225.10		Hold or Encumbrance Authorizations		AV							
06.226.10		Student Medical Records		AC	7			AC=Date of last visit			
06.227.10		Name Change Authorizations		AC	5			AC=Graduation or date of last attendance.			
06.228.10		Pass/Fail Requests		AC	1			AC=Date submitted			
06.229.10		Personal Data Information Forms		AC	1			AC=Graduation or date of last attendance			
06.230.10		Placement/Career Planning Records		AC	5			AC=Graduation or date of last attendance			
06.231.10		Registration Forms		AC	1			AC=Date submitted			



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					Years	Months	Days				
06.232.10		Transcript Requests		AC	1			AC=Date submitted			
06.233.10		Transfer Credit Evaluations		AC	5			AC=Graduation or date of last attendance			
06.234.10		Tuition and Fee Charges		AC	5			AC=Graduation or date of last attendance			
06.235.10		Withdrawal Authorizations		AC	5			AC= date of last attendance			
06.236.10		Correspondence/Extension Class Records			7						
06.237.10		Incomplete Grade Contracts		AC				AC=Settled			
06.300.10		Class Rolls - Certification		FE	5						
06.302.10		Enrollment Verifications		AC	1			AC=Verification			
06.303.10		Financial Aid Program Records		AC	5			AC=Graduation or date of last attendance or repayment of loan			
06.304.10		Social Security Certifications		AC	1			AC=Certification			
06.305.10		Teacher Certifications		AC	1			AC=Certification			
06.306.10		Veterans Administration Certification		AC	3			AC=Graduation or date of last attendance			



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06.400.10		Catalogs		PM							
06.401.10		Commencement Program		PM							
06.402.10		Degree Statistics		PM					I		
06.403.10		Enrollment Statistics		PM					I		
06.404.10		Grade Statistics		PM					I		
06.405.10		Racial/Ethnic Statistics		PM					I		
06.406.10		Schedule of Classes	Institutional	PM							
06.500.10		Requests for Formal Hearings		AC				AC=Terminate at same time as pertinent student record			
06.501.10		Requests and Disclosures of Personally Identifiable Information		AC				AC=Terminate at same time as pertinent student record			
06.502.10		Student Requests for Nondisclosure of Directory Information		AC	1			AC=Date submitted			



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06.503.10		Student Statements on Content of Records Regarding Hearing Panel Decisions		AC				AC=Terminate at same time as pertinent student record			
06.504.10		Student's Written Consent for Records Disclosure		AC				AC=Until terminated by the student, or terminate at same time as pertinent student record			
06.505.10		Waivers for Rights of Access		AC				AC=Until terminated by the student, or terminate at same time as pertinent student record			
06.506.10		Written Decisions of Hearing Panels		AC				AC=Terminate at same time as pertinent student record			
06.600.10		Student Counseling Records - Academic		AC	5			AC=Completed			
06.600.20		Student Counseling Records - Personal		AC	7			AC=Date of last contact with client; if client is a minor, AC=age of majority			22 Tex. Admin. Code 465.22(d)(2).
06.601.10		Alumni Records		PM							
06.602.10		Library Holdings	Card or automated catalogs, shelf lists, etc.	US						Holdings are not state records, but finding aids are.	



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06.603.10		Student Activities and Organizations		US	1						
06.604.10		Intercollegiate Athletics Records		AC				AC=Retain the longer of applicable NCAA, state or TAMUS requirements.			
06.605.10		Instructional Materials		US							
06.606.10		Field Trips and Sponsored Trips		AV							
07.100.10		Forest Resource Development		FE	5						
07.101.10		Research Proposals - Denied	Not Funded.		3						
07.101.20		Research Files	Funded Projects. Proposals, agreements (grants, cooperative agreements, contracts), technical reports, sub-agreements, and related records	AC	7			AC=Completion of the project or longer as required by the agreement, or applicable federal or state law or regulation.		Research data should be retained in accordance with Agency Item # 07.101.30.	Tex. Gov't Code 441.1855.
07.101.30		Research Data		AC				AC=Longest of the following: Completion of the project, as required by the agreement or applicable federal or state law or regulation, or administrative value.		Clinical laboratory records should be retained in accordance with Agency Item # 07.200.30.	



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07.101.40		Animal Management Records	Records relating to the care, management and breeding of animals for research and teaching purposes.	AC	3			AC=Longest of the following: Completion of the activity or applicable federal or state laws or regulations.		See Agency Item # 07.101.50 for Institutional Animal Care and Use Committee Records and Agency Item # 07.101.60 for Institutional Biosafety Committee Records.	9 C.F.R. 2.35
07.101.50		Institutional Animal Care and Use Committee Records	Committee records including reports and meeting documentation.	AC	3			AC=Longest of the following: Completion of the activity or applicable federal or state laws or regulations.		See Agency Item # 07.101.40 for Animal Management Records and Agency Item # 07.101.60 for Institutional Biosafety Committee Records.	9 C.F.R. 2.35
07.101.60		Institutional Biosafety Committee Records	Committee records including reports and meeting documentation.	AC	5			AC=Longest of the following: Completion of the activity or applicable federal or state laws or regulations.		See Agency Item # 07.101.50 for Institutional Animal Care and Use Committee Records and Agency Item # 07.101.70 for Institutional Review Board Committee Records.	
07.101.70		Institutional Review Board Committee Records (Human Subjects Research)	Committee records including reports and meeting documentation.	AC	3			AC=Longest of the following: Completion of the activity or applicable federal or state laws or regulations.		See Agency Item # 07.101.60 for Institutional Biosafety Committee Records.	
07.102.10		Chemical Analysis Reports			5					TAES-Texas State Chemist	



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07.200.10		Patient Records-Dental	This records series consists of the current and complete dental record for every patient seeking care or service from the Baylor College of Dentistry Clinic.	AC	5			AC=Date of patient's last visit		If a patient is younger than 18 years of age when the patient was last treated, disposition may take place on or after the date of the patient's 21st birthday or on or after the 5th anniversary of the date on which the patient was last treated, whichever date is later. 22 Tex. Admin. Code § 108.8(b). NOTE: Shadow files (copies) of patient records must be retained only for the duration necessary to assist the health care professional in tracking and providing care to the patient and should not be held any longer than the original record.	



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07.200.20		Patient Records - Medical	The record may include but is not limited to the following examples: Deficiency Sheet, Data Sheet, Record of Sensitivity, Physician Orders, History and Physical documents; Surgical records; Progress Notes; Consultation Reports; Laboratory and ancillary reports; Xray interpretation records; interpretations of the EEG, EKG and fetal heart monitor tracings; Nurses Notes; Consent Forms and Authorizations; Protocols and Proposals; and Advance Directives, for example, Medical Power of Attorney, Directive to Physicians Out of Hospital.	AC	7			AC=Last Patient Visit		After the 7th anniversary of the date on which the patient who is the subject of the record was last treated; if a patient is younger than 18 years of age when the patient was last treated, disposition may take place on or after the date of the patient's 21st birthday or on or after the 7th anniversary of the date on which the patient was last treated, whichever date is later. NOTE: Shadow files (copies) of patient records must be retained only for the duration necessary to assist the health care professional in tracking and providing care to the patient and should not be held any longer than the original record. See agency item no. -7.200.10, Patient Records - Dental.	22. Tex. Admin. Code § 165.1(b).



STATE OF TEXAS
Records Retention Schedule

SLR 105
 Rev. 2017-07

Retention Codes (field 7)

AC – See field 9 for specific records series definition
 AV – Administratively valuable
 CE – Calendar year end
 FE – Fiscal year end
 LA – Life of Asset
 PM – Permanent
 US – Until Superseded

Archival Codes (Field 10)

A/I – Transfer to State/University Archivist
 R/O – Review by State/University Archivist

1. Agency Code: 710			2. Agency Name: Texas A&M System Office (TAMUS)								
3. Agency Item No.	4. Record Series Item No.	5. Record Series Title	6. Description	7. Ret. Code	8. Retention Period			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
07.200.30		Clinical Laboratory Records		AV						No records will be destroyed in the time shorter than required by regulation. The College of American Pathologists recommends that most laboratory records be retained for 5 to 10 years at the minimum with records retained for a longer period of time when such would be appropriate for patient care, education or quality improvement needs. This record series includes, donor and recipient records, gross photographs, reports, etc., for surgical pathology, cytology, nonforensic autopsy records, forensic autopsy records, clinical pathology records, cytogenetics records, blood bank, general laboratory and other diagnostic tests. SEE the Laboratory Accreditation Newsletter published in March 2001, available electronically at http://www.cap.org , for specific recommendations on retention of various materials and records.	



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					Years	Months	Days				
07.200.40		Requests for Blood Component and Lab Tests	This series documents physician orders for laboratory tests in order to obtain blood components. It may include but is not limited to: name of patient; date; physician's signature; test(s) ordered and results; transfusion reactions, anti-body workups, and cord blood testing.	AC	7			AC=Last Patient Visit		Usually filed as part of the patient record. SEE patient records #07.200.10 and 07.200.20. After the 7th anniversary of the date on which the patient who is the subject of the record was last treated; if a patient is younger than 18 years of age when the patient was last treated, disposition may take place on or after the date of the patient's 21st birthday or on or after the 7th anniversary of the date on which the patient was last treated, whichever date is later. 22. Tex. Admin. Code § Section 165.1. NOTE: Shadow files (copies) of patient records must be retained only for the duration necessary to assist the health care professional in tracking and providing care to the patient and should not be held any longer than the original record.	



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					Years	Months	Days				
07.200.50		Pharmacy Prescription Dispensation Records	This series is used to provide an individual, daily summary, and annual summary record of initial drug dispensation and refills administered by the department as required by the Texas State Pharmacy Board. This series may include but is not limited to: prescription slips; in-house computer-generated Rx registers; controlled substance reports; and data base purge reports.		3					SEE ALSO 5.4.009 - Workplace Chemical Lists - which includes Controlled Substance Drug Logs	Tex. Health & Safety Code Sec. 481.067(c).
07.200.70		Donor Records - Medical	This records series consists of completed bequeathal forms and cadaver information for people who have donated their bodies or organs or other body parts to the agency.	PM							
07.200.80		Payment Waivers / Adjustments	Patient billing accounts that have been written off. Records may include but are not limited to payment waivers for prescriptions and copays; teaching case waivers, insurance explanation of benefits (EOB).		1					Dental School and clinics use these records as paper backup to electronic billing records systems.	
07.300.10		4-H Program Records		AV							



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					Years	Months	Days				
07.301.10		Camps/Programs for Minors Records		AC				AC=Administrative value or longer as required by applicable state law or System policy.			