

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 1 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

<b><u>ADMINISTRATION RECORDS</u></b>								
<b>Section 1.1 - General</b>								
<b>1.1.002</b>	01.100.10	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+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.	
<b>1.1.004</b>	01.101.10	Legislative Appropriations Requests – Including any supporting documentation created and/or used to justify and support legislative appropriations requests by an agency.	AC+6		AC+6	A	AC = September 1 of odd-numbered calendar years.  Records with archival value will be retained in the agency archives.	
<b>1.1.006</b>	01.102.10	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+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	

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---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 2 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>				
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Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

<b>1.1.007</b>	01.103.10	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.	3		3	R	item number 1.1.048.  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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<b>1.1.008</b>	01.104.10	Correspondence - General – Non-administrative incoming/outgoing and	1		1		SEE comments to item number 1.1.007. SEE ALSO item number		
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---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 3 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

<b>1.1.010</b>	01.105.10	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)	US+1		US+1		1.1.010	
<b>1.1.011</b>	01.106.10	Directives (routine issuances on general office procedures)	US+3		US+3	A		
<b>1.1.013</b>	01.107.10	Executive Orders – Any document that initiates, rescinds, or amends a regulation, policy, or procedure that governs the programs, services, or projects of an agency.	CE+1		CE+1	R	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.	
		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.						

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---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 4 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>				
-------------	------------	-------------	--	--	--	--	--

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

<b>1.1.014</b>	01.108.10	Legal Opinions and Advice – from agency legal counsel or the Attorney General including request eliciting the opinions	AV		AV	R	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	
<b>1.1.019</b>	01.109.10	Public Relations Records – News or press releases issued by the agency. Includes print, electronic, audio, and audiovisual	2		2	R		
<b>1.1.020</b>	01.110.10	Public Information Requests, Not Exempted – 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+1		AC+1		AC=Date Request Fulfilled	
<b>1.1.021</b>	01.111.10	Public Information Requests, Exempted – Includes all correspondence and documentation	AC+2		AC+2		AC = Date of notification that records are exempt.	

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---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 5 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>						
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival		106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks			

<b>1.1.023</b>	01.112.10	relating to requests for records that are exempt under Public Information Act (Chapter 552, Government Code).  Organization Charts	US		US	A			
<b>1.1.024</b>	01.113.10	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+3	R	AC=Decision made to implement or not to implement result of planning process		
<b>1.1.026</b>	01.114.10	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+1		AC=Date of publication in the Texas Register		
<b>1.1.027</b>	01.115.10	Proposed Legislation – Drafts of proposed legislation and related correspondence.	AV		AV				

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---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 6 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>						
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival		106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks			

<b>1.1.038</b>	01.116.10	Customer Surveys – Surveys returned by the customers or clients of an agency, and the statistical data maintained rating an agency’s performance.	AC		AC		AC = Final disposition of summary report		
<b>1.1.040</b>	01.117.10	Speeches, Papers and Presentations - Notes or text of papers, presentations, or reports delivered in conjunction with agency work.	AC		AC	R	AC = End of term in office or service in a state position.		
<b>1.1.041</b>	01.118.10	Suggestion System – Suggestions submitted by agency personnel and responses.	1		1				
<b>1.1.043</b>	01.119.10	Training Manuals – Instructional materials developed by an agency for training entities or individuals it regulates or serves.	US+1		US+1				
<b>1.1.048</b>	01.120.10	Litigation Files – Records created by or on behalf of an agency in anticipation	AC+1		AC+1	R	AC=As applicable, decision of an agency not to file a lawsuit or		

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---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 7 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>				
-------------	------------	-------------	--	--	--	--	--

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

		of or in the adjudication of a lawsuit.						
<b>1.1.053</b>	01.121.10	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	<p>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.</p> <p>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.</p> <p>AC = Report filed with the Texas Ethics Commission.</p>		

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---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 8 of 92

Agency Code <b>710</b>		Agency Name <b>The Texas A&amp;M University System</b>						
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			
<b>1.1.055</b>	01.122.10	Strategic Plans Includes information resources and operational strategic plans prepared in accordance with Tex. Govt. Code, §§ 2054.095 and 2056.002.	AC+6		AC+6	A	AC=September 1 of odd-numbered calendar years  Agency retains the permanent Record Copy and sends required copies to the Publications Depository Program, Texas State Library	
<b>1.1.056</b>	01.123.10	ADA (American with Disabilities Act Documentation - Self evaluations and plans documenting compliance with Americans With Disabilities Act.	3		3		28 Code of Federal Regulations (CFR) 35.105 (c)	
<b>1.1.057</b>	01.124.10	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	AC		AC		AC=Purpose of record has been fulfilled.  CAUTION: Records management officers should use caution in assigning this records series item	

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---	--	-----------------------------------	---	---



STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 9 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

<b>1.1.058</b>	01.125.10	Meeting Agenda and Minutes –  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.	PM		PM	A	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).  Agency retains permanent copy.	
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---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 10 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>				
-------------	------------	-------------	--	--	--	--	--

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

		Official agenda and minutes of state boards, committees, commissions, and councils that conduct open meetings as required by Government Code Chapter 551.						
<b>1.1.059</b>	01.126.10	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+2	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.  AC = The data of the meeting or completion of pending action involving the meeting, whichever is later.		
<b>1.1.060</b>	01.127.10	Meetings, Audio and Videotapes of Open Audio or videotapes of open meetings of state boards, commissions, committees, etc.	AC + 90 days		AC+ 90 days	AC = Official Approval of written minutes of the meeting by governing body of an agency  CAUTION: Minutes of state agencies are permanent records.		

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---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 11 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

<b>1.10.061</b>	01.128.10	Meeting Notes – Notes taken during open meetings of state boards, commissions, committees, and councils from which written minutes are prepared	AC + 90 days		AC + 90 days		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.	
<b>1.1.062</b>	01.129.10	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	2		2	A	AC = Approval of the formal minutes by the governing body.	

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**

Form SLR 105C  
must accompany  
this form.

Page 12 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>						
-------------	------------	-------------	--	--	--	--	--	--	--

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival		106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks			

		meetings for briefing purposes, some of which may not be submitted at an actual meeting.							
<b>1.1.063</b>	01.130.10	Staff Meeting Minutes/Notes – Minutes or notes, and supporting documentation taken at internal agency staff meetings	1		1				
<b>1.1.064</b>	01.131.10	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		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.		
<b>1.1.065</b>	01.132.10	Reports and Studies (Non-Fiscal) - Raw Data – Information or data collected and compiled for the purpose of producing non-fiscal reports.	AV		AV				
<b>1.1.066</b>	01.133.10	Reports, Annual and Biennial Agency	AC+6		AC+6	A	AC=September 1 <sup>st</sup> of odd-		

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---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 13 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

<b>1.1.067</b>	01.134.10	(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.  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		3	R	numbered calendar years  Agency retains the Record Copy and sends required copies to the Publications Depository Program	
<b>1.1.068</b>	01.135.10	Reports on Performance Measures - Quarterly and annual reports on agency performance measures submitted to executive and legislative offices	AC+6		AC+6		AC=September 1 <sup>st</sup> of odd-numbered calendar years	

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---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**

*Form SLR 105C  
must accompany  
this form.*

Page 14 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>						
-------------	------------	-------------	--	--	--	--	--	--	--

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

<b>1.1.069</b>	01.136.10	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		1			
<b>1.1.070</b>	01.137.10	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+3	R	AC = Completion or termination of programs, rules, policies or procedures.  SEE ALSO: Agency Rules, Policies and Procedures – Working Files, item number 1.1.071	
<b>1.1.071</b>	01.138.10	Agency Rules, Policies, and Procedures – Working Files – Manuals, guidelines,	AC+3		AC+3	R	AC = Completion or termination of programs, rules, policies or	

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 15 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

<b>1.1.072</b>	01.139.10	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.  Public Information Reports – Reports made to Texas Building and Procurement Commission on an agency's Public Information Act activities.	2		2		procedures. See also item number 1.1.070	
<b>1.1.073</b>	01.140.10	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+3	R	AC = Last action.	

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**

*Form SLR 105C  
must accompany  
this form.*

Page 16 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
-------------	------------	-------------	--	--	--	--	--	--

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

<b>1.1.074</b>	01.141.10	Sunset Review Report and Documentation	AC+3		AC+3	R	AC = After the subsequent Sunset Review		
<b>1.1.075</b>	01.142.10	Alternative Dispute Resolutions – Final Agreement – Final agreement described by Government Code §2009.054©, 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+4		AC = Date of final agreement. Texas Civil Practice and Remedies Code, Chapter 154.071		
	01.143.10	Patents and Related Documents	AV		AV				
	01.144.10	Organizational Memberships	AV		AV				
	01.145.10	Gift and Donor Records	PM		PM				

<b>1.2.001</b>	01.200.10	<b>Section 1.2 - Records Management</b> Destruction Authorizations –	FE+3		FE+3				
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Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---



STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**

*Form SLR 105C  
must accompany  
this form.*

Page 17 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

<b>1.2.003</b>	01.201.10	Agency level documents authorizing final disposition of records under a certified records retention schedule						
		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+1	AC=Discontinue use of forms		
<b>1.2.004</b>	01.202.10	Forms Inventory – Any periodic listing of all forms used internally or externally by an agency	US		US			
<b>1.2.005</b>	01.203.10	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		US	Original is retained permanently by SLRMD of Texas State Library. Record copy retained by Records Management Officer.		
<b>1.2.006</b>	01.204.10	Records Transmittal Forms (Agency	AC+2		AC+2	AC=Date of authorization for		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
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STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**

*Form SLR 105C  
must accompany  
this form.*

Page 18 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>				
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Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival Remarks	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

<b>1.2.008</b>	01.205.10	Copy) – Forms indicate records transferred to storage or a transfer of legal custody. Request for Authority to Dispose of State Records.	FE+3		FE+3	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. Original is retained by the Records Retention Officer		
<b>1.2.010</b>	01.206.10	Records Disposition Logs	10		10			
<b>1.2.012</b>	01.207.10	Records Inventory Worksheets	US		US			
<b>1.2.013</b>	01.208.10	Records Control Locator Aids – Includes indexes, card files, shelf lists, registers, guides, etc.	AC		AC	AC = When control aid is updated, revised, or no longer needed.		
<b>1.2.014</b>	01.209.10	Records Management Plan	US+1		US+1			
<b>1.2.015</b>	01.210.10	Disaster Recovery Service Transmittals (RMD 109) – Also includes documentation for disaster recovery services provided by other	FE+1		FE+1	See Also 5.4.013		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
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STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 19 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
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Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

<b>1.2.016</b>	01.211.10	entities Disaster Recovery Service Approval Form (RMD 113) – Agency Copy of Form	AC		AC		AC=Until superseded or termination of service.	
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<b>1.3.001</b>	01.300.10	<b>Section 1.3 - Publications</b> 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+2		AC=Until Superseded or obsolete.  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	
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Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
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STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**

*Form SLR 105C  
must accompany  
this form.*

Page 20 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>				
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Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

<b>1.3.002</b>	01.301.10	Publication Files – Background material, copy (drafts), original artwork, photo negatives, prints, flats, etc. This includes all work performed both inside and outside	AV		AV	R		
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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.

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
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STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 21 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

		the agency.						
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		<b>Section 1.4 - Academic Administration Records</b>						
	01.400.10	Accreditation Files	PM		PM		May be archived after 10 years but must be maintained permanently.	
	01.401.10	Completed Class Tests and Examinations, Students' Course Papers	AV+1		AV+1		Review before disposal as some may merit permanent retention for historical reasons.	
	01.402.10	Course Syllabus/Outlines Files	AV		AV			
	01.403.10	Curriculum Files, Including Revisions, Central Administrative	US+5		US+5			
	01.404.10	Curriculum Files, including Revisions, Departmental	US+5		US+5			
	01.405.10	Instructor/Faculty Evaluations	AC+1		AC+1	AC=Academic term		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
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STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 22 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
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Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

	01.406.10	Instructor Grade Books	AC+1		AC+1	AC=Academic term		
	01.407.10	Instructor Grade Sheets	AC+1		AC+1	AC=Academic term		
	01.409.10	New Course Proposals File, Central Administrative	AV		AV			
	01.410.10	New Course Proposals File, Departmental	AV		AV			
		For Class Lists, see Section 6.2 For Grade Books, see Section 6.2 For Class Schedule (institutional), see Section 6.4						

		<b><u>ELECTRONIC DATA PROCESSING RECORDS</u></b>						
		<b>Section 2.1 - Automated</b>						

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 23 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		
<b>2.1.001</b>	02.100.10	<b>Applications</b>  Processing Files - Machine-readable files used in the creation, utilization, and updating of master files,	AC		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.		
<b>2.1.002</b>	02.101.10	Master Files – Relatively long-lived computer files containing organized and consistent sets of complete and accurate electronic records.  Examples include, but are not	AC		AC	AC = Completion of 3rd verification cycle, or audit completion confirming successful transaction processing, or required audit trail maintenance, or the		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
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STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 24 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

		limited to, data tables of relational databases used by applications or computer programs.				ability to restore or migrate when errors are detected or when hardware or software changes occur.		
<b>2.1.007</b>	02.102.10	Software Programs – Automated software applications and operating system files including job control language, program listing/source code, etc.	AC		AC	<p>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.</p> <p>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.</p>		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---



STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
*Form SLR 105C  
 must accompany  
 this form.*

Page 25 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
-------------	------------	-------------	--	--	--	--	--	--

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

						13 TAC 6.94.  CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.		
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Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
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STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 26 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

<b>2.1.008</b>	02.103.10	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	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. 13 TAC 6.94.  CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.		
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Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
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STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 27 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

<b>2.1.009</b>	02.104.10	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	AC		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. 13 TAC 6.94.  CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.		
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Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 28 of 92

Agency Code <b>710</b>		Agency Name <b>The Texas A&amp;M University System</b>						
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival Remarks	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			
		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.						
<b>2.1.010</b>	02.10 <del>5</del> .10	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	AC=All audit requirements have been met		
<b>2.1.011</b>	02.106.10	Finding Aids, Indexes and Tracking Systems- Automated indexes, lists, registers and other finding aids used to provide access to records	AC		AC	AC=The related records have been destroyed.  CAUTION: These records must carry the same retention period		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 29 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

and archival code of the records they support.

<b>2.2.001</b>	02.200.10	<b>Section 2.2 - Computing Operations and Technical Support</b> 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		AV			
<b>2.2.002</b>	02.201.10	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		FE+3			
<b>2.2.004</b>	02.202.10	Computer Job Schedules and Reports – Schedules or similar records showing computer jobs to be run and other	3 MO		3 MO			

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 30 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

<b>2.2.010</b>	02.203.10	reports by computer operators or programmers of work performed.						
<b>2.2.011</b>	02.204.10	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 back-up, etc.	US+3		US+3		CAUTION: Does not include technical documentation of procedures necessary for reading or processing of electronic records. See item number 2.1.009.	
<b>2.2.012</b>	02.205.10	Batch Data Entry Control Records – Forms and logs used to reconcile batches submitted for procession against batches received and processed.	AC		AC		AC = When reconciliation confirmed.	
<b>2.2.012</b>	02.205.10	Output Records for Computer Production (Mini and Mainframe) – Reports showing transactions that were accepted, rejected, suspended, and/or processed.	AV		AV			

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**

*Form SLR 105C  
must accompany  
this form.*

Page 31 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
-------------	------------	-------------	--	--	--	--	--	--

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

<b>2.2.013</b>	02.206.10	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	AC=No longer needed as an audit trail for any records modified		
<b>2.2.014</b>	02.207.10	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		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).		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 32 of 92

Agency Code <b>710</b>		Agency Name <b>The Texas A&amp;M University System</b>						
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival Remarks	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			
<b>2.2.015</b>	02.208.10	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 generated a record of a usage of a state-owned computer.	AV		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).		
<b>2.2.016</b>	02.209.10	Software Registrations, Warranties and Licensee Agreements	LA+3		LA+3			

		<b><u>PERSONNEL RECORDS</u></b>						
		<b>Section 3.1 - Employee Records</b>						
<b>3.1.001</b>	03.100.10	Applications for Permanent Employment - Not Hired – Applications, resumes, transcripts, letters of reference, and similar	2		2	Includes Temporary Employment  29 CFR)1602.31 (State Agencies);		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A –Retain in Archives R– Review by Archivist
---	--	-----------------------------------	---	---



STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 33 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

<b>3.1.002</b>	03.101.10	documents whose submission by candidates for vacant positions is required on the application form, by application procedures, or in the employment ad.  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+5	29 CFR 1602.49(a) (State Universities)  Includes Temporary Employment and Certificate of Age (minor workers)  AC=Termination of Employment		
<b>3.1.006</b>	03.102.10	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+3	AC = Termination of Counseling  Period is AC+10 if counseling provided by, and records kept by a license psychologist as required by TAC Title 22 Part 21 Chapter		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A –Retain in Archives R– Review by Archivist
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STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**

*Form SLR 105C  
must accompany  
this form.*

Page 34 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>				
-------------	------------	-------------	--	--	--	--	--

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

<b>3.1.011</b>	03.103.10	Employee's Insurance File – Copies of information relating to the selection by employees of life, disability, health, and other types of insurance.	AC		AC	465.22 d 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		
<b>3.1.012</b>	03.104.10	Employment Opportunity Announcements – Internal or external announcements or advertisements of job openings, promotions, training programs, or opportunities for overtime.	2		2	29 CFR 1602.31(a) (State Agencies) 29 CFR 1602.49(a) (State Universities)		
<b>3.1.013</b>	03.105.10	Employment Contracts	AC+4		AC+4	AC=Expiration or termination of		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 35 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

<b>3.1.014</b>	03.106.10	Employment Selection Records Includes notes of interviews with candidates; audio and videotapes of job interviews; background, criminal history 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.	2		2	the contract according to its terms.  29 CFR 1602.31(a) (State Agencies) 29 CFR 1602.49 (State Universities)  CAUTION: Does not include criminal history checks. See item number 3.1.026		
<b>3.1.018</b>	03.107.10	Grievance Records – Records relating to the review of employee grievances against personnel policies, working conditions, etc.	AC+2		AC+2	AC=Final decision on the grievance  CAUTION: Does not include formal complaints filed by an employee with the Equal		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 36 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

<b>3.1.019</b>	03.108.10	Performance Appraisals	2		2	Employment Opportunity Commission. See Item Number 1.1.048  29 CFR 1620.32(a) and (c)  Includes related documents such as goals, objectives, and career planning.		
<b>3.1.020</b>	03.109.10	Personnel Corrective Action Documentation (does not affect pay, status or tenure)	AC+5		AC+5	AC=Termination of Corrective Action  CAUTION: If, during the retention period of this record 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		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**

*Form SLR 105C  
must accompany  
this form.*

Page 37 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>				
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Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

<b>3.1.021</b>	03.110.10	Personnel Disciplinary Action Documentation (affects pay, status or tenure)	AC+5		AC+5	used to support disciplinary action must be retained for the minimum retention period described by item number 3.1.021.  AC=Termination of Employment		
<b>3.1.022</b>	03.111.10	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.	2		2	Form 500  29 CFR 1602.31(a) (State Agencies) 29 CFR 1602.49(a) (State Universities)		
<b>3.1.023</b>	03.112.10	Position/Job Descriptions – Job	AC+4		AC+4	AC = Until superseded or job		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 38 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

<b>3.1.024</b>	03.114.10	descriptions, including all associated task or skill statements, for positions in agency.  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+2	eliminated.  40 TAC 815.106(i)  AC = Until superseded or termination of employment.  CAUTION: Does not include pre-employment physical examinations. See item number 3.1.014		
<b>3.1.026</b>	03.115.10	Criminal History Checks – Criminal history record information on job applicants or agency employees obtained from the Department of Public Safety (DPS).	AC		AC	AC = The criminal history record has served the immediate purpose for which is obtained.  CAUTION: Agencies that are authorized to obtain criminal history record information from DPS must refer to its agency’s legislation or see Subchapter F,		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**

*Form SLR 105C  
must accompany  
this form.*

Page 39 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

<b>3.1.027</b>	03.116.10	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+5	Chapter 411, Government Code for appropriate retention and use of this information.  AC=Termination of Employment		
<b>3.1.029</b>	03.117.10	Documentation or Verification of Employment Eligibility Federal reporting form (INS I-9)	AC+1		AC+1	8 CFR 274a.2 (b)(2)(i)(A) and (c)(2)  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		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 40 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

<b>3.1.031</b>	03.118.10	Employee Benefits - Other than Insurance – Agency copies of information relating to the selection of available benefit options other than insurance	AC+2		AC+2	<p>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.</p> <p>AC = Until superseded or termination of employment.</p> <p>Caution: Documents that serve as payroll deduction authorizations must be maintained for the retention period prescribed for item number 3.2.001.</p>		
<b>3.1.034</b>	03.119.10	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	AV		AV	See item number 3.1.014 for resumes, whether solicited or unsolicited, that are used in any way in the employment selection		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---



STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 41 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

<b>3.1.035</b>	03.120.10	openings. 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. (Does not include construction and architectural surety bonds - See 5.2.028)	AC+4		AC+4	process. 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.		
<b>3.1.036</b>	03.121.10	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	5		5	29 CFR 30.8(e)		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A –Retain in Archives R– Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 42 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

<b>3.1.037</b>	03.122.10	from labor), minority status, and gender of all selected and rejected applicants. Employee Recognition (awards, incentives, tenure, etc.)	AC+ 5		AC +5	AC=Termination of Employment		
<b>3.1.038</b>	03.123.10	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		US	See item number 3.3.001		
<b>3.1.039</b>	03.124.10	Ombudsman Records – Consultation records, notes, letters, memos, emails, reports and other documentation	AC		AC	AC = Final decision or matter closed.		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A –Retain in Archives R– Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 43 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

						Caution: Does not include formal compliant filed with EEO. If matter becomes a grievance or the subject of counseling or litigation, or employee in 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.		
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		<b>Section 3.2 - Payroll</b>						
<b>3.2.001</b>	03.200.10	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+4	AC=After termination of employee or after amendment, expiration, or termination of authorization, whichever is sooner		
<b>3.2.002</b>	03.201.10	Employee Earning Records	4		4	40 TAC 815.106(i)		
<b>3.2.003</b>	03.202.10	Federal Tax Records (1099, W-2, and	AC+4		AC+4	AC = Tax due date, date claim is		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A –Retain in Archives R– Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 44 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

		other tax records)				filed, or date tax is paid whichever is later.		
<b>3.2.004</b>	03.203.10	Income Adjustment Authorization – Used to make increases or decreases to employees’ gross pay, FICA, retirement, or in the computation of taxes.	2		2	26 CFR 31.6001-1(e)(2) 29 CFR 516.6(c)		
<b>3.2.005</b>	03.204.10	W-4 Forms – Employer’s copy of “Employees’ Withholding Exemption Certificate.”	AC+4		AC+4	AC = Until superseded, obsolete, or upon separation of employee. 26 CFR 31.6001-1 (e) (2)		
<b>3.2.006</b>	03.205.10	Wage Rate Tables	2		2	29 CFR 516.6(a)(2)		
<b>3.2.007</b>	03.206.10	Unemployment Compensation	AC+5		AC+5	AC = Settled		
<b>3.2.008</b>	03.207.10	Direct Deposit Applications/Authorization	US		US			

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 45 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
-------------	------------	-------------	--	--	--	--	--	--

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

<b>3.2.009</b>	03.208.10	State Deferred Compensation Records	AC+5		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 Texas		
<b>3.2.010</b>	03.209.10	Human Resource Information System (HRIS) Reports and supporting documentation	AC+4		AC+4			

<b>3.3.001</b>	03.300.10	<b>Section 3.3 - Personnel Administration</b> Affirmative Action Plans – for both regular employees and apprenticeship	5		5	29 CFR 30.8(e) For apprenticeship plans		
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Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A –Retain in Archives R– Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**

*Form SLR 105C  
must accompany  
this form.*

Page 46 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>				
-------------	------------	-------------	--	--	--	--	--

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival Remarks	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

<b>3.3.004</b>	03.301.10	programs Benefit Plans – Employee benefit plans such as pension, live, health, and disability insurance; deferred compensation; etc., including amendments.	US+1		US+1	29 CFR 1627.3(b)(2) Includes Group Insurance Records.		
<b>3.3.010</b>	03.302.10	Labor Statistics Report – Reports providing statistical information on labor force.	3		3			
<b>3.3.011</b>	03.303.10	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+7 5		AC+7 5	AC=Termination of Employment. See item number 3.1.038		
<b>3.3.015</b>	03.304.10	Positions/Job Classification Review File – Records relating to review and monitoring of job classifications within an agency.	US+3		US+3			

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**

*Form SLR 105C  
must accompany  
this form.*

Page 47 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>				
-------------	------------	-------------	--	--	--	--	--

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival Remarks	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

<b>3.3.020</b>	03.305.10	Work Schedules/Assignments – Work, duty, shift, crew, or case schedules, rosters, or assignments.	2		2			
<b>3.3.022</b>	03.306.10	Texas Workforce Commission (TWC) - Reports from TWC to the agency or its predecessor pertaining to employees.	3		3			
<b>3.3.023</b>	03.307.10	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		FE+3	Includes request for tuition assistance.		
<b>3.3.024</b>	03.308.10	Personnel Policies and Procedures – Any internally distributed manuals, guidelines, or similar records that define agency wide policies and	US+3		US+3			

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 48 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

<b>3.3.025</b>	03.309.20	procedures concerning the personnel of an agency  Job Procedure Records – Any documents detailing the procedural duties and responsibilities of agency positions on a position-by-position basis.	US+3		US+3			
<b>3.3.026</b>	03.310.10	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		US+3			
<b>3.3.027</b>	03.311.10	Aptitudes & Skills Tests and Test Papers – Aptitude or skills tests required of job applicants or of current	US+2		US+2	29 CFR 1602.31(a) (State Agencies) 29 CFR 1602.49(a) (State		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---



STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 49 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>				
-------------	------------	-------------	--	--	--	--	--

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival Remarks	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

<b>3.3.029</b>	03.312.10	personnel to qualify for promotion or transfer.  Aptitude and Skills Test (Validation Records)	AC+2		AC+2	Universities)  Caution: One copy of each different test (different in terms of either questions or administration procedures) should be retained for the period indicated.  AC = As long as the test is used by an agency  29 CFR 1602.31(a) (State Agencies) 29 CFR 1602.49(a) (State Universities)		
<b>3.3.030</b>	03.313.10	Training Administration Records	US+2		US+2	Caution: Does not include hazardous material training records. See item number 5.4.007.		
<b>3.3.031</b>	03.314.10	EEO Reports and Supporting Documentation – Includes	3		3	29 CFR 1602.32, 48 and 50		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 50 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
-------------	------------	-------------	--	--	--	--	--	--

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

		documentation used to complete EEO reports						
<b>3.3.032</b>	03.315.10	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		3		29 CFR 1620.32	

		<b>Section 3.4 - Time and Leave Records</b>						
<b>3.4.001</b>	03.400.10	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		4			
<b>3.4.002</b>	03.401.10	Leave Status Report (each pay cycle)	4		4			

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 51 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
-------------	------------	-------------	--	--	--	--	--	--

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival Remarks	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

		– Cumulative report is issued pay cycle and provides employee leave status information for each position.						
<b>3.4.003</b>	03.402.10	Less Than Full-Time Worked (dates and hours)	4		4	40 TAC 815.106(i)		
<b>3.4.004</b>	03.403.10	Overtime Authorizations	2		2			
<b>3.4.005</b>	03.404.10	Overtime Schedules	2		2			
<b>3.4.006</b>	03.405.10	Time Cards and Time Sheets	4		4	40 TAC 815.106(i)		
<b>3.4.007</b>	03.406.10	Time Off and/or Sick Leave Requests	4		4	Includes supporting documentation for leave requests, such as physician statements.		
<b>3.4.008</b>	03.407.10	Sick Leave Pool Records - Donations and Withdrawals	4		4			

<b><u>FISCAL RECORDS</u></b>								
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Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 52 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

		<b>Section 4.1 - Worksheets, Detail Information on Financial Event or Transaction</b>					
<b>4.1.001</b>	04.100.10	Accounts Payable Information	FE+3		FE+3		
<b>4.1.002</b>	04.101.10	Billing Detail	FE+3		FE+3	CAUTION: Does not include long distance telephone billing detail. See item numbers 5.5.001, 5.5.006, and 5.5.007.	
<b>4.1.003</b>	04.102.10	Cancelled Checks/Stubs/Warrants/Drafts	FE+3		FE+3		
<b>4.1.004</b>	04.103.10	Encumbrance Detail	FE+3		FE+3		
<b>4.1.005</b>	04.104.10	Inventory and Other Cost Files - Production, job labor quotes, pricing, specifications, etc.	FE+3		FE+3		
<b>4.1.006</b>	04.105.10	Investment Transaction Files	FE+3		FE+3		
<b>4.1.007</b>	04.106.10	Transfers or Budget Revisions -	FE+3		FE+3		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 53 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
-------------	------------	-------------	--	--	--	--	--	--

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

<b>4.1.008</b>	04.107.10	Transfers or adjustment to budgets Electronic Fund Transfers - Direct Deposit Registers	FE+3		FE+3			
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<b>4.2.001</b>	04.200.10	<b>Section 4.2 - Documents of Original Entry</b> Cash Deposit Vouchers (including deposit slips)	FE+3		FE+3			
<b>4.2.002</b>	04.201.10	Cash Receipts – Includes receipts for fees (permits, licenses, renewals, etc.).	FE+3		FE+3			
<b>4.2.003</b>	04.202.10	Daily Cash Receipts Log	FE+3		FE+3			
<b>4.2.004</b>	04.203.10	Encumbrance Vouchers – Orders, statements, change orders, etc.	FE+3		FE+3			
<b>4.2.005</b>	04.204.10	Purchase Vouchers – Requisitions, orders, receiving reports, invoices, or statements, change orders, best value	FE+3		FE+3			

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
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STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**

*Form SLR 105C  
must accompany  
this form.*

Page 54 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
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Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival Remarks	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

		determination etc.						
<b>4.2.006</b>	04.205.10	General Journal Vouchers	FE+3		FE+3			
<b>4.2.007</b>	04.206.10	Expenditure Vouchers (includes travel expense reports, payroll, etc.)	FE+3		FE+3	Includes Credits		

		<b>Section 4.3 - Journals or Registers</b>						
<b>4.3.001</b>	04.300.10	Sales Journals or Registers	FE+3		FE+3			
<b>4.3.002</b>	04.301.10	Receipts Journals or Registers	FE+3		FE+3			
<b>4.3.003</b>	04.302.10	Expenditures Journals or Registers	FE+3		FE+3			

		<b>Section 4.4 - Ledgers</b>						
<b>4.4.001</b>	04.400.10	General and Subsidiary Ledgers	FE+3		FE+3			
<b>4.4.002</b>	04.401.10	Accounts Receivable Ledgers	FE+3		FE+3			
<b>4.4.003</b>	04.402.10	Accounts Payable Ledgers	FE+3		FE+3			

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
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STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**

Form SLR 105C  
must accompany  
this form.

Page 55 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

<b>4.4.004</b>	04.403.10	Employee Savings Bond Ledgers	FE+3		FE+3			
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		<b>Section 4.5 - Reports</b>						
<b>4.5.001</b>	04.500.10	Worksheets for Preparing Fiscal Reports	FE+3		FE+3			
<b>4.5.002</b>	04.501.10	Internal Fiscal Management Reports – Includes monthly budget reports.	FE+3		FE+3			
<b>4.5.003</b>	04.502.10	Annual Financial Report (required by General Appropriations Act)	AC+6		AC+6	AC=September 1 <sup>ST</sup> of odd-numbered calendar years		
						Agency retains Record Copy and sends required. number of copies to Publications Depository Program-TSL		
<b>4.5.005</b>	04.503.10	External Fiscal Reports - Special purpose – Federal financial reports, salary reports, etc. Includes HUB Reports.	FE+3		FE+3			

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
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STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 56 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
-------------	------------	-------------	--	--	--	--	--	--

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

<b>4.5.006</b>	04.504.10	Annual Operating budget – Required by the General Appropriations Act	FE+3		FE+3			
<b>4.5.007</b>	04.505.10	USAS Reports – Daily	AC		AC		AC = Receipt and reconciliation of monthly report.	
<b>4.5.008</b>	04.506.10	USAS Reports – Monthly	AC		AC		AC = Receipt and reconciliation of annual report.	
<b>4.5.009</b>	04.507.10	USAS Reports – Annual	FE+3		FE+3			

<b>Section 4.6 - Documents Showing Compliance with System of Internal Control</b>								
<b>4.6.001</b>	04.600.10	Balancing Records	FE+3		FE+3			
<b>4.6.002</b>	04.601.10	Reconciliations	FE+3		FE+3			
<b>4.6.003</b>	04.602.10	Cash Counts	FE+3		FE+3			

<b>Section 4.7 - Other Fiscal Records</b>								
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Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---



STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 57 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

<b>4.7.001</b>	04.700.10	Accounting Policies and Procedures Manual	US+3		US+3			
<b>4.7.002</b>	04.701.10	Bank Statements	FE+3		FE+3			
<b>4.7.003</b>	04.702.10	Returned Checks/Warrants/Drafts (Uncollectible)	AC+3		AC+3	AC=After deemed uncollectible		
<b>4.7.004</b>	04.703.10	Capital Asset Records	LA+3		LA+3			
<b>4.7.005</b>	04.704.10	Claim Files	AC+3		AC+3	AC = Resolution of Claim		
<b>4.7.006</b>	04.705.10	Comptroller Statements	FE+3		FE+3			
<b>4.7.007</b>	04.706.10	Detail Chart of Accounts - One for all accounts in use for a year.	FE+3		FE+3			
<b>4.7.008</b>	04.707.10	Federal Grant Information on File	AC+3		AC+3	AC = Satisfaction of all Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments (Common Rule)		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A –Retain in Archives R– Review by Archivist
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STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 58 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

<b>4.7.009</b>	04.708.10	Fixed Asset Sequential Number Log	US+3		US+3	CAUTION: Retention may vary depending on the specific federal funding agency. Agency must ensure that records are retained for the appropriate retention period.			
<b>4.7.010</b>	04.709.10	Long-Term Liability (bonds, etc.)	AC+3		AC+3		AC=Retirement of debt		
<b>4.7.011</b>	04.710.10	Texas Building and Procurement Commission (TBPC) Statements – Charge or bill statements received by agencies from the TBPC for services provided.	FE+3		FE+3				
<b>4.7.012</b>	04.711.10	Signature Authorizations – Signature cards or similar records establishing authority of an agency employee to initiate or authorize financial transactions on behalf of an agency.	US + FE+3		US + FE+3	Includes employee application for procurement/payment card, travel card or other similar methods of payment for goods and/or services.			

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 59 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

		<b><u>SUPPORT SERVICES RECORDS</u></b>						
		<b>Section 5.1 - General</b>						
<b>5.1.001</b>	05. <del>15</del> 00.1 0	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, accepted and rejected bids, performance bonds, contracts, purchase orders, inspection reports, and correspondence. Includes research contracts and documents of original entry - federal contracts	AC+4		AC+4		AC=Expiration or termination of the instrument according to its terms. See item number 5.2.028 for building construction contracts and item number 5.1.017	
<b>5.1.003</b>	05. <del>15</del> 01.1 0	Delivery Reports	2		2			
<b>5.1.004</b>	05. <del>15</del> 02.1	Mailing and Telecommunications	US		US			

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
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STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 60 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

	0	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.						
5.1.005	05.1503.10	Postage Records – Records and reports of postage expenses, including postage meter use	FE+3		FE+3		Includes express delivery and campus post offices.	
5.1.007	05.1504.10	Requisitions for In-House Copy/Inter-Agency/Printing Service – includes word processing and data processing	AV		AV			
5.1.010	05.1505.10	Licenses & Permits for Non-vehicles – Does not include licenses and permits issued by an agency as part of its statutory responsibilities.	AC+2		AC+2		AC = Expiration date of license or permit.	
5.1.011	05.1506.10	Photocopier and Telefax Use Logs & Reports	AV		AV			

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**

*Form SLR 105C  
must accompany  
this form.*

Page 61 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>				
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Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

<b>5.1.012</b>	05. <del>15</del> 07.10	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		US+3			
<b>5.1.013</b>	05. <del>15</del> 08.10	Insurance Policies – For vehicles, equipment, etc.	AC+4		AC+4	AC=Expiration or termination of the policy according to its terms		
<b>5.1.014</b>	05. <del>15</del> 09.10	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		US+1			
<b>5.1.015</b>	05. <del>15</del> 10.10	Correspondence Tracking Records - Any record created by an agency to track any type of incoming and outgoing correspondence or packages	1		1			

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 62 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
-------------	------------	-------------	--	--	--	--	--	--

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

<b>5.1.017</b>	05.1511.10	by the U.S. Postal Service or by private couriers.  Contract Log – List of agency contracts, leases, and agreements including general obligation, land lease, utilities, and construction contracts.	FE+3		FE+3			
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<b>5.2.001</b>	05.200.10	<b>Section 5.2 - Facility Management Records</b>  Appraisals - Building or Property	AV		AV	R	Disclosure of Information would be “closed” until a contract is awarded and “open” after awarding of a contract	
<b>5.2.002</b>	05.201.10	Building Construction Project Files – Planning, design, and construction records; accepted and rejected bids; correspondence; etc.	AC+10		AC+10	R	AC = Completion of project. See also item numbers 5.2.003 and 5.2.028.	

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
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STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 63 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

<b>5.2.003</b>	05.202.10	Building Plans & Specifications – Leased Includes architectural and engineering drawings, profiles and blueprints.	AC+2		AC+2	R	AC=Termination or cancellation of lease See also item numbers 5.2.002 and 5.2.028.		
<b>5.2.003</b>	05.203.20	Building Plans & Specifications - State-Owned Includes architectural and engineering drawings, profiles and blueprints.	LA		LA		See also item numbers 5.2.002 and 5.2.028		
<b>5.2.004</b>	05.204.10	Building Space Requests	1		1				
<b>5.2.005</b>	05.205.10	Calibration Records (Equipment or Instrument)	10		10				
<b>5.2.006</b>	05.206.10	Certificate of Destruction of Property	FE+3		FE+3				
<b>5.2.007</b>	05.207.10	Damage Reports	FE+3		FE+3				
<b>5.2.008</b>	05.208.10	Equipment History File; Equipment Service Agreements – Agreements or contracts with an equipment vendor to provide maintenance service for	LA+3		LA+3		Includes IT hardware/software maintenance records		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R– Review by Archivist
---	--	-----------------------------------	---	--

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**

*Form SLR 105C  
must accompany  
this form.*

Page 64 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>				
-------------	------------	-------------	--	--	--	--	--

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

		equipment. Includes requests for installation, moves, service, etc.; and service/repairs logbooks, etc.						
<b>5.2.009</b>	05.209.10	Equipment Inventory Detail Report Form – Updates agency portion of the inventory listing and adds, changes, transfers, or deletes items from inventory.	FE+3		FE+3			
<b>5.2.010</b>	05.210.10	Equipment Manuals	LA		LA			
<b>5.2.011</b>	05.211.10	Equipment Warranties	AC+1		AC+1	AC = Expiration of Warranty.		
<b>5.2.012</b>	05.212.10	Estimate Files (Supply & Repair Cost Estimates)	1		1			
<b>5.2.014</b>	05.213.10	Inventory – Annual Physical	FE+3		FE+3			
<b>5.2.015</b>	05.214.10	Notice of Equipment Removed From Inventory	FE+3		FE+3			

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---



STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 65 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

<b>5.2.016</b>	05.215.10	Inventory System Update Listing – Listing shows all additions, changes, deletions, and transfer times for the monthly processing period.	AC		AC	AC=until transfer of information onto annual listing		
<b>5.2.017</b>	05.216.10	Lost and Stolen Property Report	FE+3		FE+3			
<b>5.2.018</b>	05.217.10	Quality Control Reports	2		2			
<b>5.2.019</b>	05.218.10	Service Orders – agency copy of forms completed by mechanical service personnel for installation or repair. Includes billing code, service, labor, parts, and remarks.	1		1			
<b>5.2.020</b>	05.219.10	Supply Usage Records	FE+1		FE+1			
<b>5.2.021</b>	05.220.10	Surplus Property Sale	FE+3		FE+3			
<b>5.2.022</b>	05.221.10	Utility Reports	AV		AV	Includes Energy Management Reports		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**

*Form SLR 105C  
must accompany  
this form.*

Page 66 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

<b>5.2.023</b>	05.222.10	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		FE+3			
<b>5.2.024</b>	05.223.10	Material Specifications	AC+2		AC+2		AC = Material is no longer in the agency.	
<b>5.2.025</b>	05.224.10	Equipment Descriptions and Specifications	AC+2		AC+2		AC = Equipment is no longer in the agency.	
<b>5.2.026</b>	05.225.10	Facilities Reservation Logs	2		2		From date of event.	
<b>5.2.027</b>	05.226.10	Space Utilization Reports	AV		AV			
<b>5.2.028</b>	05.227.10	Building Construction Contract & Inspection Records – Building construction contracts, surety bonds, and inspection records	LA+10		LA+10	R	See also item numbers 5.2.002 and 5.2.003	

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 67 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

	05.229.10	Facilities Inventory	LA+2		LA+2			
	05.230.10	Real Property	LA+2		LA+2	Examples; deeds, permits, easements, closing documents, surveys, appraisals, mineral activities, maps, etc.		
		<b>Section 5.3 - Purchasing</b>						
<b>5.3.002</b>	05.300.10	Freight Bills Paid	FE+3		FE+3			
<b>5.3.003</b>	05.301.10	Freight Claims	AC+2		AC+2	AC=Resolution of claim		
<b>5.3.004</b>	05.302.10	Orders – Acknowledgments	AV		AV			
<b>5.3.005</b>	05.303.10	Packing Slips	AV		AV			
<b>5.3.007</b>	05.304.10	Purchase Orders – Includes bid requisitions/authorizations, invitations to bid or propose, bid specifications, accepted and rejected bids, and bid tabulations/evaluations.	FE+3		FE+3	CAUTION: If a formal written contract is the result of a successful bid or request for proposal, the successful bid or request for proposal and its supporting documentation must		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 68 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>				
-------------	------------	-------------	--	--	--	--	--

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

<b>5.3.008</b>	05.305.10	Purchasing Logs – log, register, etc., providing a record of purchase orders issued, orders received, and similar data on procurement status.	FE+3		FE+3	be retained for the same period as the contract. See item number 5.1.001 and 5.2.028.  Only rejected bids maintained by agency.		
<b>5.3.009</b>	05.306.10	Requests for Information – Requests for information preliminary to the procurement of goods or services by direct purchase or bid.	AC		AC	AC=Date of direct purchase, issuance of request for bids, or decision not to proceed with the procurement, as applicable		

<b>5.4.001</b>	05.400.10	<b>Section 5.4 – Risk Management</b>  Accident Reports and Associated Documentation – Accident or occupational disease reports (by	CE+5		CE+5	Includes Workers Compensation Reports.		
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Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 69 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>				
-------------	------------	-------------	--	--	--	--	--

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

		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.				29 CFR 1904.6 - The Texas Department of Insurance's copy is retained an additional 50 years		
<b>5.4</b>	05.401.20	Workers' Compensation Claim Files	AC		AC	AC=Death of Claimant. Files maintained by System Workers' Compensation Office		
<b>5.4.002</b>	05.402.10	Evacuation Plans	US		US			
<b>5.4.003</b>	05.403.10	Inspection Records – Fire, safety, and other inspection records of facilities and equipment.	AC+3		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.		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A –Retain in Archives R– Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 70 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>				
-------------	------------	-------------	--	--	--	--	--

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			
<b>5.4.004</b>	05.404.10	Fire Orders (issued by Fire Marshal to correct fire code deficiencies)	AC+3		AC+3	AC=Deficiency corrected		
<b>5.4.007</b>	05.405.10	Hazardous Materials Training Records	5		5	Texas Health and Safety Code, §502.009(g)		
<b>5.4.008</b>	05.406.10	Hazard Communication Plans	US+5		US+5	Texas Health and Safety Code, §502.009(g)		
<b>5.4.009</b>	05.407.10	Workplace Chemical Lists	30		30	Texas Health and Safety Code, §502.009(d)		
<b>5.4.010</b>	05.408.10	Material Safety Data Sheets	AC		AC	AC = After sheets are updated or hazardous chemical no longer stored by agency, as applicable		
<b>5.4.011</b>	05.409.10	Visitor Control Registers Logs, registers, or similar records documenting visitors to limited access or restricted areas of facilities.	3		3			
<b>5.4.012</b>	05.410.10	Security Access Records – Records	AC+2		AC+2	AC=Until superseded, date of		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 71 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>				
-------------	------------	-------------	--	--	--	--	--

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival Remarks	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

<b>5.4.013</b>	05.411.10	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.  Disaster Preparedness and Recovery Plan	US		US	expiration, or date of termination, whichever sooner		
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<b>5.5.001</b>	05.500.10	<b>Section 5.5 - Telecommunications</b> Billing Detail - Telecommunication (Other Than TEX-AN) – In addition to summary detail, includes any accompanying detailed listing of long distance calls.	FE+3		FE+3	See item number 5.5.006 for TEX-AN billing detail.		
<b>5.5.002</b>	05.501.10	Long Distance Telephone Log (includes Wire Transfers) – Long distance logs created by departments for internal documentation purposes. Includes any similar logs created for	AV		AV			

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**

*Form SLR 105C  
must accompany  
this form.*

Page 72 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>				
-------------	------------	-------------	--	--	--	--	--

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

		long distance facsimile or electronic transmissions.						
<b>5.5.003</b>	05.502.10	Station Activity Reports – Internal listing of incoming/ outgoing telephone activity to individual telephone stations.	AV		AV			
<b>5.5.004</b>	05.503.10	System Activity Reports – Internal listing of all incoming/outgoing agency telephone activity.	AV		AV			
<b>5.5.006</b>	05.504.10	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		FE+3	The billing agency will maintain all long distance TEX-AN records and will provide each using agency its bill summary of centralized capitol complex telephone service without call detail records. For these bill summaries, SEE item number 4.7.011. See item number 5.5.001 for billing detail from carriers other than TEX-AN		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---



STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**

*Form SLR 105C  
must accompany  
this form.*

Page 73 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

<b>5.5.007</b>	05.505.10	Disputed Call Documentation – Documentation relating to disputed long distance calls, including documents evidencing repayment by employees for personal long distance use.	FE+3		FE+3			
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		<b>Section 5.6 - Vehicles</b>						
<b>5.6.001</b>	05.600.10	Airplane Flight Logs (State-owned)	LA+3		LA+3			
<b>5.6.001</b>	05.600.20	Airplane Flight Logs (Leased)	FE+3		FE+3			
<b>5.6.002</b>	05.601.10	Airplane Passenger Lists	FE+3		FE+3			
<b>5.6.003</b>	05.602.10	Inspection Repair & Maintenance Records - Vehicles	LA+1		LA+1	For TAMUS aircraft, maintained in Aircraft Log Books which remain in aircraft. Copies are maintained with vouchers.		
<b>5.6.004</b>	05.603.10	License and Driving Record Check	AC		AC	AC = Until superseded or until		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**

*Form SLR 105C  
must accompany  
this form.*

Page 74 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>				
-------------	------------	-------------	--	--	--	--	--

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

<b>5.6.005</b>	05.604.10	Vehicle Use Reports – Includes mileage, fuel/oil consumption, passengers carried and other related operational information.	FE+3		FE+3	termination of employment  For TAMUS aircraft, maintained in combined form with the Airplane Passenger Lists and Mileage Report		
<b>5.6.007</b>	05.605.10	Vehicle Titles and Registrations	LA		LA			
<b>5.6.008</b>	05.606.10	Pilot License Verification	AC+5		AC+5	AC=Termination of Employment		
<b>5.6.009</b>	05.607.10	Parking Permits or Assignments	US		US			

	05.700.10	<b>Section 5.7 - Campus Security, Traffic &amp; Parking</b>  Accident Reports File records relating to traffic accidents, including accident reports, supplemental accident reports, photographs, correspondence and related documentation.	AC+2		AC+2	AC=Settled  If as a result of an accident, a person is arrested and charged with driving while intoxicated or with at least a second degree felony, the accident report shall		
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Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 75 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

						be considered an offense investigation record and must be retained for the appropriate period see Agency Item # 05.711.10.		
	05.701.10	Arrest File	3	7	10			
	05.702.10	Building Security Reports/File	2		2			
	05.703.10	Campus Security Reports	2		2	Not including Clery reports. See Agency Item # 05.706.10.		
	05.704.10	Citations (Unpaid)	CE+6		CE+6	Transfer to Paid File upon payment		
	05.705.20	Citations (Paid)	CE+6		CE+6			
	05.706.10	Clery Annual Security Reports	CE+3		CE+3	20 U.S.C. § 1092(f); 34 C.F.R. § 668.24.		
	05.706.20	Clery Crime Statistics Data	CE+6		CE+6	All supporting records used in compiling each Clery annual		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 76 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

						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.		
	05.707.10	Parking Violation Reports	3	2	5			
	05.708.10	Police Call Sheets	2		2			
	05.709.10	Police Dispatcher Logs	2		2			
	05.710.10	Police Incident Reports	CE+6		CE+6			
	05.711.10	Police Offense Reports	AC	1 0	AC+10	AC=Closed		
	05.712.10	Student Safety Records (traffic appeals, etc.)	AC	5	AC+5	AC=Settled		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 77 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>				
-------------	------------	-------------	--	--	--	--	--

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

	05.713.10	Temporary Vehicle Registration	1		1			
	05.714.10	Tow Records	3		3			
	05.715.10	Vehicle Registration Files	2		2			
		For Lost and Stolen Property Report, see 5.2.017						
		For Parking Permits or Assignments, see 5.6.009						
		For Schedules (Duty Rosters), see 3.3.020						
		For Security Access Records, see 5.4.012						

		<b>Section 5.8 – Real Estate</b>						
	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,	AC+4		AC+4	R	AC=For so long as the real estate asset is owned.	

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 78 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

	05.801.10	judgments, title policy or opinions of title, closing documents, surveys, maps, plats, property descriptions and related correspondence.  Real Estate, Conveyed - 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, title policy or opinions of title, closing documents, surveys, maps, plats, property descriptions and related correspondence.	AC+4		AC+4	AC=Date of Conveyance		
	05.802.10	Valuation and Condition Reports - appraisals, broker's opinions of value, tax assessments, property condition reports, inspection reports, geotechnical studies, archeological studies, environmental assessments, hydrology studies, ADA compliance	AV		AV	No longer than 4 years from the date of acquisition and/or completion of construction.		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 79 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

	05.803.10	reports, habitat and endangered species studies, and related correspondence. Land Management - commercial and agricultural leases, easements, permits, licenses, minute orders for leases and easements, lease assignments, accounting records, tax statement/payment/exemption records, and related correspondence.	AC+4		AC+4	AC=Expiration or Termination of the Instrument according to its terms.		
	05.804.10	Mineral Management Records - oil and gas leases, proposed drilling program, general land office statements, production statements, royalty payment records, pooling agreements, mineral lease assignments, division orders, minute orders, seismic permit records, well logs, related correspondence, notice of auction, bid forms.	AC+5		AC+5	AC=Expiration or termination of the instrument according to its terms.		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 80 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

<b><u>STUDENT RECORDS</u></b>								
<b>Section 6.1 - Admissions Data/Documents</b>								
	06.100.10	Applicants Who Do Not Enter	AC+1		AC+1	AC=Application term		
	06.100.20	Documents for Applicants Who Enter	AC+5		AC+5	AC=Graduation or date of last attendance		
						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,		
						Includes transcripts, acceptance letters, advanced placement		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---



STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 81 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>				
-------------	------------	-------------	--	--	--	--	--

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

	06.101.10	Letters of Recommendation	AC		AC	records, applications for admission & readmission, correspondence, entrance examination reports, medical records, placement scores, residency classification forms, test scores)  AC=After student (applicants who enter) is admitted		
	06.102.10	Recruitment Materials (applicants who enter)	AC		AC	Waivers of rights of access filed with letters of recommendation should be retained as long as the file is retained.		
	06.102.20	Recruitment Materials for Veterans	3		3	VA Regulations		
	06.103.10	Scholarship Applications	AC+1		AC+1	AC=Closed		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A –Retain in Archives R– Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 82 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

		<b>Section 6.2 - Registration and Records Data/Documents</b>					
	06.200.10	Miscellaneous Academic Records-	AC+3		AC+3	Three years after student graduates or leaves, microfilm records.	
	06.201.10	Academic Action Authorizations (dismissal, etc.)	AC+5		AC+5	AC=Graduation or date of last attendance	
	06.202.10	Advanced Placement Records	AC+5		AC+5	AC=Graduation or date of last attendance.	
	06.203.10	Applications for Graduation	AC+1		AC+1	AC=Graduation or date of last attendance	
	06.204.10	Duplicate Diploma Requests	AV+1		AV+1		
	06.205.10	Applications for Admission or Readmission (Accepted)	AC+5		AC+5	AC=Graduation or date of last attendance	
	06.206.10	Audit Authorizations	AC+1		AC+1	AC = Date submitted	

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**

*Form SLR 105C  
must accompany  
this form.*

Page 83 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>				
-------------	------------	-------------	--	--	--	--	--

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

	06.207.10	Changes of Course (add/drop)	AC+1		AC+1	AC=end of academic term		
	06.208.10	Change of Grade Forms (update documents)	AC+1		AC+1	AC=Date submitted.		
	06.209.10	Class Lists (original grade sheets)	AC+1		AC+1	AC=Closed		
	06.210.10	Class Schedules (students)	AC+1		AC+1	AC=Graduation or date of last attendance		
	06.211.10	Correspondence, Relevant to Students' Registration and Data Documents	AC+5		AC+5	AC=Graduation or date of last attendance		
	06.212.10	Course Inventory Data File	5		5			
	06.213.10	Credit by Examination Forms	AC		AC	AC=end of term credit is awarded or denied plus 5 years		
	06.214.10	Credit/No Credit Approvals	AC+1		AC+1	AC=Date submitted		
	06.215.10	Curriculum Change Authorizations	AC+5		AC+5	AC=Graduation or date of last attendance		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**

*Form SLR 105C  
must accompany  
this form.*

Page 84 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>				
-------------	------------	-------------	--	--	--	--	--

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

	06.216.10	Degree Audit Records	AC+5		AC+5	AC=Graduation or date of last attendance		
	06.217.10	Degree Audit Request Forms	AV		AV			
	06.218.10	Disciplinary Action Documents – routine and advance disciplinary actions including dismissal, suspension, blocked from reenrollment, etc.	AC+5		AC+5	AC=Graduation or date of last attendance		
	06.219.10	Fee Assessment Forms	AC+5		AC+5	AC=Graduation or date of last attendance		
	06.220.10	Financial Aid Audit Documents	AC+3		AC+3	AC=A minimum of three years after annual audit accepted by Department of Education		
	06.221.10	Foreign Student Forms (I-20, etc.)	AC+5		AC+5	AC=Graduation or date of last attendance		
	06.222.10	Grade Reports (registrar’s copies)	AC+1		AC+1	AC=Distribution		
	06.223.20	Graduation Lists	PM		PM	A Master microfilm copy stored in		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 85 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

						archives.		
	06.224.10	Graduation Authorizations	AC+5		AC+5	AC=Graduation or date of last attendance		
	06.225.10	Hold or Encumbrance Authorizations	AV		AV			
	06.226.10	Medical Records	AC+1 0		AC+1 0	AC=Date of last visit		
	06.227.10	Name Change Authorizations	AC+5		AC+5	AC=Graduation or date of last attendance.		
	06.228.10	Pass/Fail Requests	AC+1		AC+1	AC=Date submitted		
	06.229.10	Personal Data Information Forms	AC+1		AC+1	AC=Graduation or date of last attendance		
	06.230.10	Placement/Career Planning Records	AC+5		AC+5	AC=Graduation or date of last attendance		
	06.231.10	Registration Forms	AC+1		AC+1	AC=Date submitted		

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
---	--	-----------------------------------	---	---

STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 86 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

	06.232.10	Transcript Requests	AC+1		AC+1	AC=Date submitted		
	06.233.10	Transfer Credit Evaluations	AC+5		AC+5	AC=Graduation or date of last attendance		
	06.234.10	Tuition and Fee Charges	AC+5		AC+5	AC=Graduation or date of last attendance		
	06.235.10	Withdrawal Authorizations	AC+5		AC+5	AC= date of last attendance		
	06.236.10	Correspondence/Extension Class Records	7		7			
	06.236.10	Incomplete Grade Contracts	AC		AC	AC=Settled		

		<b>Section 6.3 – Certification Data/Documents</b>						
	06.300.10	Class Rolls – Certification	FE+5		FE+5			

Retention Code AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months	PM – Permanent US – Until Superseded	Archival Codes A – Retain in Archives R – Review by Archivist
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STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 87 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total	Remarks		

	06.302.10	Enrollment Verifications	AC+1		AC+1	AC=Verification		
	06.303.10	Financial Aid Program Records	AC+5		AC+5	AC=Graduation or date of last attendance or repayment of loan		
	06.304.10	Social Security Certifications	AC+1		AC+1	AC=Certification		
	06.305.10	Teacher Certifications	AC+1		AC+1	AC=Certification		
	06.306.10	Veterans Administration Certification	AC+3		AC+3	AC=Graduation or date of last attendance		

		<b>Section 6.4 - Publications, Statistics, Institutional Reports</b>						
	06.405.10	Catalogs	PM		PM			
	06.401.10	Commencement Program	PM		PM			
	06.402.10	Degree Statistics	PM		PM			

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STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**

*Form SLR 105C  
must accompany  
this form.*

Page 88 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
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Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

	06.403.10	Enrollment Statistics	PM		PM			
	06.404.10	Grade Statistics	PM		PM			
	06.405.10	Racial/Ethnic Statistics	PM		PM			
	06.406.10	Schedule of Classes (institutional)	PM		PM			

		<b>Section 6.5 - Family Educational Rights and Privacy Act Data/Documents</b>						
	06.500.10	Requests for Formal Hearings	AC		AC		AC=Terminate at same time as pertinent student record	
	06.501.10	Requests and Disclosures of Personally Identifiable Information	AC		AC		AC=Terminate at same time as pertinent student record	
	06.502.10	Student Requests for Nondisclosure of Directory Information	AC+1		AC+1		AC=Date submitted	

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STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 89 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>				
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Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

	06.503.10	Student Statements on Content of Records Regarding Hearing Panel Decisions	AC		AC	AC=Terminate at same time as pertinent student record		
	06.504.10	Student's Written Consent for Records Disclosure	AC		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	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	AC=Terminate at same time as pertinent student record		

		<b>Section 6.6 - Other Student-Related Records</b>						
	06.600.10	Student Counseling Records – Academic	AC+5		AC+5	AC=Completed		

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STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 90 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>					
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Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

	06.600.20	Student Counseling Records – Personal	AC+10		AC+10	AC=Date of last contact with client; if client is a minor, AC=age of majority		
	06.601.10	Alumni Records	PM		PM			
	06.602.10	Library Holdings – card or automated catalogs, shelf lists, etc.	US		US	Holdings are not state records, but finding aids are.		
	06.603.10	Student Activities and Organizations	US+1		US+1			
	06.604.10	Athletic Records	AV		AV	Athletic Department to use retention schedule based on NCAA Retention Requirements in addition to State and System Schedule		
	06.605.10	Instructional Materials	US		US			

		<u>AGENCY PROGRAM RECORDS</u>						
		<b>Section 7.1 - Research and</b>						

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STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**  
Form SLR 105C  
must accompany  
this form.

Page 91 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>				
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Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival Remarks	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

		<b>Development Records</b>						
	07.700.10	Forest Resource Development	FE+5		FE+5			
	07.701.10	Research Proposals - Denied (Not Funded)	3		3			
	07.701.20	Research Proposals - Accepted (Funded)	AV		AV	Become parts of the contracts, as applicable.		
	07.702.10	Chemical Analysis Reports	5		5	TAES-Texas State Chemist		

		<b><u>Section 7.2 - Dental Records</u></b>						
	07.200.10	Dental Records	AC+10		AC+10	AC=Last patient visit  For Pediatric Dental Records, see Tex. Health and Safety Code Ann. Sec. 241.103. If a patient was younger than 18 years of age when last treated, records will not be disposed of until on or after the date of the patient's 20 <sup>th</sup>		

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STATE OF TEXAS

**Records Retention Schedule**

**SLR 105**

*Form SLR 105C  
must accompany  
this form.*

Page 92 of 92

Agency Code	<b>710</b>	Agency Name	<b>The Texas A&amp;M University System</b>				
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Records Series Item No.	Agency Item No.	Record Series Title	Retention Period			Archival	106 No.	TSLAC ONLY Amend. No.
			Agency	Storage	Total			

						birthday or on or after the 10 <sup>th</sup> anniversary of the date on which the patient was last treated, whichever date is later.  Includes mental & physically challenged patients.		
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