

STATE OF TEXAS

Records Retention Schedule

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| Agency Code | 710 | Agency Name | The Texas A&M University System | | | | | |
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| <u>ADMINISTRATION RECORDS</u> | | | | | | | | |
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| Section 1.1 - General | | | | | | | | |
| 1.1.002 | 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. | |
| 1.1.004 | 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. | |
| 1.1.006 | 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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| 1.1.007 | 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 | | |
| 1.1.008 | 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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| | | 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) | | | | | 1.1.010 | |
| 1.1.010 | 01.105.10 | Directives (routine issuances on general office procedures) | US+1 | | US+1 | | | |
| 1.1.011 | 01.106.10 | Executive Orders – Any document that initiates, rescinds, or amends a regulation, policy, or procedure that governs the programs, services, or projects of an agency. | US+3 | | US+3 | A | | |
| 1.1.013 | 01.107.10 | Calendars, Appointments and Itinerary Records – Desk calendars, appointment books, and similar records, purchased with state funds that documents appointments, itineraries, and other activities of an agency official or employee. | CE+1 | | 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. | |

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| 1.1.014 | 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 | |
| 1.1.019 | 01.109.10 | Public Relations Records – News or press releases issued by the agency. Includes print, electronic, audio, and audiovisual | 2 | | 2 | R | | |
| 1.1.020 | 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 | |
| 1.1.021 | 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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| | | relating to requests for records that are exempt under Public Information Act (Chapter 552, Government Code). | | | | | | |
| 1.1.023 | 01.112.10 | Organization Charts | US | | US | A | | |
| 1.1.024 | 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 | |
| 1.1.026 | 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 | |
| 1.1.027 | 01.115.10 | Proposed Legislation – Drafts of proposed legislation and related correspondence. | AV | | AV | | | |

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| 1.1.038 | 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 | |
| 1.1.040 | 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. | |
| 1.1.041 | 01.118.10 | Suggestion System – Suggestions submitted by agency personnel and responses. | 1 | | 1 | | | |
| 1.1.043 | 01.119.10 | Training Manuals – Instructional materials developed by an agency for training entities or individuals it regulates or serves. | US+1 | | US+1 | | | |
| 1.1.048 | 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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| 1.1.053 | 01.121.10 | <p>of or in the adjudication of a lawsuit.</p> <p>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.</p> | 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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| 1.1.055 | 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 | |
| 1.1.056 | 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) | |
| | | | | | | | | |
| 1.1.057 | 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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| 1.1.058 | 01.125.10 | <p>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.</p> <p>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.</p> | PM | | PM | A | <p>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.</p> <p>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).</p> | | |
| | | Meeting Agenda and Minutes – | | | | | Agency retains permanent copy. | | |

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| | | Official agenda and minutes of state boards, committees, commissions, and councils that conduct open meetings as required by Government Code Chapter 551. | | | | 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. | | |
| 1.1.059 | 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 | AC = The data of the meeting or completion of pending action involving the meeting, whichever is later. | | |
| 1.1.060 | 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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| 1.10.061 | 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. AC = Approval of the formal minutes by the governing body. |
| 1.1.062 | 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 | | |

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| | | meetings for briefing purposes, some of which may not be submitted at an actual meeting. | | | | | | | |
| 1.1.063 | 01.130.10 | Staff Meeting Minutes/Notes – Minutes or notes, and supporting documentation taken at internal agency staff meetings | 1 | | 1 | | | | |
| 1.1.064 | 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. | | |
| 1.1.065 | 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 | | | | |
| 1.1.066 | 01.133.10 | Reports, Annual and Biennial Agency | AC+6 | | AC+6 | A | AC=September 1 st of odd- | | |

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| 1.1.067 | 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 | |
| 1.1.068 | 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 st of odd-numbered calendar years | |

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| 1.1.069 | 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 | | | |
| 1.1.070 | 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 | |
| 1.1.071 | 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 | |

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| 1.1.072 | 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 | |
| 1.1.073 | 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. | |

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| 1.1.074 | 01.141.10 | Sunset Review Report and Documentation | AC+3 | | AC+3 | R | AC = After the subsequent Sunset Review | | |
| 1.1.075 | 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 | | | | |

| | | Section 1.2 - Records Management | | | | | | | |
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| 1.2.001 | 01.200.10 | Destruction Authorizations – | FE+3 | | FE+3 | | | | |

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| 1.2.003 | 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 | | |
| 1.2.004 | 01.202.10 | Forms Inventory – Any periodic listing of all forms used internally or externally by an agency | US | | US | | | |
| 1.2.005 | 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. | | |
| 1.2.006 | 01.204.10 | Records Transmittal Forms (Agency | AC+2 | | AC+2 | AC=Date of authorization for | | |

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| | | Copy) – Forms indicate records transferred to storage or a transfer of legal custody. | | | | | | |
| 1.2.008 | 01.205.10 | 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 |
| 1.2.010 | 01.206.10 | Records Disposition Logs | 10 | | 10 | | | |
| 1.2.012 | 01.207.10 | Records Inventory Worksheets | US | | US | | | |
| 1.2.013 | 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. |
| 1.2.014 | 01.209.10 | Records Management Plan | US+1 | | US+1 | | | |
| 1.2.015 | 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 |

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| 1.2.016 | 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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| 1.3.001 | 01.300.10 | Section 1.3 - Publications 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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| 1.3.002 | 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 | <p>retention.</p> <p>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.</p> <p>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.</p> | | |
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| | | the agency. | | | | | | |
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| | | Section 1.4 - Academic Administration Records | | | | | | |
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| | 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 | | |

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| | 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 | | | | | | |

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

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| 2.1.001 | 02.100.10 | Applications 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. | | |
| 2.1.002 | 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 | | |

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| | | 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. | | |
| 2.1.007 | 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> | | |

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| | | | | | | 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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| 2.1.008 | 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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| 2.1.009 | 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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| | | 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. | | | | | | |
| 2.1.010 | 02.10 5 .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 | | |
| 2.1.011 | 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 | | |

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and archival code of the records they support.

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| 2.2.001 | 02.200.10 | Section 2.2 - Computing Operations and Technical Support 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 | | | |
| 2.2.002 | 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 | | | |
| 2.2.004 | 02.202.10 | Computer Job Schedules and Reports – Schedules or similar records showing computer jobs to be run and other | 3 MO | | 3 MO | | | |

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| 2.2.010 | 02.203.10 | reports by computer operators or programmers of work performed. | | | | | | |
| 2.2.011 | 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. | |
| 2.2.012 | 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. | |
| 2.2.012 | 02.205.10 | Output Records for Computer Production (Mini and Mainframe) – Reports showing transactions that were accepted, rejected, suspended, and/or processed. | AV | | AV | | | |

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| 2.2.013 | 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 | | |
| 2.2.014 | 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). | | |

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| 2.2.015 | 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). | | |
| 2.2.016 | 02.209.10 | Software Registrations, Warranties and Licensee Agreements | LA+3 | | LA+3 | | | |

| | | <u>PERSONNEL RECORDS</u> | | | | | | |
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| | | Section 3.1 - Employee Records | | | | | | |
| 3.1.001 | 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); | | |

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| 3.1.002 | 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 | | |
| 3.1.006 | 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 | | |

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| 3.1.011 | 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 | | |
| 3.1.012 | 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) | | |
| 3.1.013 | 03.105.10 | Employment Contracts | AC+4 | | AC+4 | AC=Expiration or termination of | | |

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| 3.1.014 | 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 | | |
| 3.1.018 | 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 | | |

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| 3.1.019 | 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. | | |
| 3.1.020 | 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 | | |

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| 3.1.021 | 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 | | |
| 3.1.022 | 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) | | |
| 3.1.023 | 03.112.10 | Position/Job Descriptions – Job | AC+4 | | AC+4 | AC = Until superseded or job | | |

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| 3.1.024 | 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 | | |
| 3.1.026 | 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, | | |

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| 3.1.027 | 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 | | |
| 3.1.029 | 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 | | |

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| 3.1.031 | 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> | | |
| 3.1.034 | 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 | | |

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| 3.1.035 | 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. | | |
| 3.1.036 | 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) | | |

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| 3.1.037 | 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 | | |
| 3.1.038 | 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 | | |
| 3.1.039 | 03.124.10 | Ombudsman Records – Consultation records, notes, letters, memos, emails, reports and other documentation | AC | | AC | AC = Final decision or matter closed. | | |

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| | | | | | | 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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| | | Section 3.2 - Payroll | | | | | | |
| 3.2.001 | 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 | | |
| 3.2.002 | 03.201.10 | Employee Earning Records | 4 | | 4 | 40 TAC 815.106(i) | | |
| 3.2.003 | 03.202.10 | Federal Tax Records (1099, W-2, and | AC+4 | | AC+4 | AC = Tax due date, date claim is | | |

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| | | other tax records) | | | | filed, or date tax is paid whichever is later. | | |
| | | | | | | 26 CFR 31.6001-1(e)(2) | | |
| 3.2.004 | 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 | 29 CFR 516.6(c) | | |
| 3.2.005 | 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) | | |
| 3.2.006 | 03.205.10 | Wage Rate Tables | 2 | | 2 | 29 CFR 516.6(a)(2) | | |
| 3.2.007 | 03.206.10 | Unemployment Compensation | AC+5 | | AC+5 | AC = Settled | | |
| 3.2.008 | 03.207.10 | Direct Deposit Applications/Authorization | US | | US | | | |

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| 3.2.009 | 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 | | |
| 3.2.010 | 03.209.10 | Human Resource Information System (HRIS) Reports and supporting documentation | AC+4 | | AC+4 | | | |

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| 3.3.001 | 03.300.10 | Section 3.3 - Personnel Administration Affirmative Action Plans – for both regular employees and apprenticeship | 5 | | 5 | 29 CFR 30.8(e) For apprenticeship plans | | |
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| 3.3.004 | 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. | | |
| 3.3.010 | 03.302.10 | Labor Statistics Report – Reports providing statistical information on labor force. | 3 | | 3 | | | |
| 3.3.011 | 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 | | |
| 3.3.015 | 03.304.10 | Positions/Job Classification Review File – Records relating to review and monitoring of job classifications within an agency. | US+3 | | US+3 | | | |

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| 3.3.020 | 03.305.10 | Work Schedules/Assignments – Work, duty, shift, crew, or case schedules, rosters, or assignments. | 2 | | 2 | | | |
| 3.3.022 | 03.306.10 | Texas Workforce Commission (TWC) - Reports from TWC to the agency or its predecessor pertaining to employees. | 3 | | 3 | | | |
| 3.3.023 | 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. | |
| 3.3.024 | 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 | | | |

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| 3.3.025 | 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 | | | |
| 3.3.026 | 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 | | | |
| 3.3.027 | 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 | | |

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| 3.3.029 | 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) | | |
| 3.3.030 | 03.313.10 | Training Administration Records | US+2 | | US+2 | Caution: Does not include hazardous material training records. See item number 5.4.007. | | |
| 3.3.031 | 03.314.10 | EEO Reports and Supporting Documentation – Includes | 3 | | 3 | 29 CFR 1602.32, 48 and 50 | | |

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| | | documentation used to complete EEO reports | | | | | | |
| 3.3.032 | 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 | | |

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|----------------|-----------|--|---|--|---|--|--|--|
| | | Section 3.4 - Time and Leave Records | | | | | | |
| 3.4.001 | 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 | | | |
| 3.4.002 | 03.401.10 | Leave Status Report (each pay cycle) | 4 | | 4 | | | |

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

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| <u>FISCAL RECORDS</u> | | | | | | | | |
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| | | Section 4.1 - Worksheets, Detail Information on Financial Event or Transaction | | | | | |
|----------------|-----------|--|------|--|------|---|--|
| 4.1.001 | 04.100.10 | Accounts Payable Information | FE+3 | | FE+3 | | |
| 4.1.002 | 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. | |
| 4.1.003 | 04.102.10 | Cancelled Checks/Stubs/Warrants/Drafts | FE+3 | | FE+3 | | |
| 4.1.004 | 04.103.10 | Encumbrance Detail | FE+3 | | FE+3 | | |
| 4.1.005 | 04.104.10 | Inventory and Other Cost Files - Production, job labor quotes, pricing, specifications, etc. | FE+3 | | FE+3 | | |
| 4.1.006 | 04.105.10 | Investment Transaction Files | FE+3 | | FE+3 | | |
| 4.1.007 | 04.106.10 | Transfers or Budget Revisions - | FE+3 | | FE+3 | | |

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

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

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| | | Section 4.3 - Journals or Registers | | | | | | |
| 4.3.001 | 04.300.10 | Sales Journals or Registers | FE+3 | | FE+3 | | | |
| 4.3.002 | 04.301.10 | Receipts Journals or Registers | FE+3 | | FE+3 | | | |
| 4.3.003 | 04.302.10 | Expenditures Journals or Registers | FE+3 | | FE+3 | | | |

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| | | Section 4.4 - Ledgers | | | | | | |
| 4.4.001 | 04.400.10 | General and Subsidiary Ledgers | FE+3 | | FE+3 | | | |
| 4.4.002 | 04.401.10 | Accounts Receivable Ledgers | FE+3 | | FE+3 | | | |
| 4.4.003 | 04.402.10 | Accounts Payable Ledgers | FE+3 | | FE+3 | | | |

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

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

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

| Section 4.7 - Other Fiscal Records | | | | | | | | |
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| 4.7.001 | 04.700.10 | Accounting Policies and Procedures Manual | US+3 | | US+3 | | | |
| 4.7.002 | 04.701.10 | Bank Statements | FE+3 | | FE+3 | | | |
| 4.7.003 | 04.702.10 | Returned Checks/Warrants/Drafts (Uncollectible) | AC+3 | | AC+3 | AC=After deemed uncollectible | | |
| 4.7.004 | 04.703.10 | Capital Asset Records | LA+3 | | LA+3 | | | |
| 4.7.005 | 04.704.10 | Claim Files | AC+3 | | AC+3 | AC = Resolution of Claim | | |
| 4.7.006 | 04.705.10 | Comptroller Statements | FE+3 | | FE+3 | | | |
| 4.7.007 | 04.706.10 | Detail Chart of Accounts - One for all accounts in use for a year. | FE+3 | | FE+3 | | | |
| 4.7.008 | 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) | | |

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| | | | | | | CAUTION: Retention may vary depending on the specific federal funding agency. Agency must ensure that records are retained for the appropriate retention period. | | |
| 4.7.009 | 04.708.10 | Fixed Asset Sequential Number Log | US+3 | | US+3 | | | |
| 4.7.010 | 04.709.10 | Long-Term Liability (bonds, etc.) | AC+3 | | AC+3 | AC=Retirement of debt | | |
| 4.7.011 | 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 | | | |
| 4.7.012 | 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. | | |

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| | | <u>SUPPORT SERVICES RECORDS</u> | | | | | | |
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| | | Section 5.1 - General | | | | | | |
| 5.1.001 | 05.1500.10 | 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 | |
| 5.1.003 | 05.1501.10 | Delivery Reports | 2 | | 2 | | | |
| 5.1.004 | 05.1502.1 | Mailing and Telecommunications | US | | US | | | |

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| | 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 | | | |

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| 5.1.012 | 05. 15 07.1 0 | 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 | | | |
| 5.1.013 | 05. 15 08.1 0 | Insurance Policies – For vehicles, equipment, etc. | AC+4 | | AC+4 | AC=Expiration or termination of the policy according to its terms | | |
| 5.1.014 | 05. 15 09.1 0 | 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 | | | |
| 5.1.015 | 05. 15 10.1 0 | Correspondence Tracking Records - Any record created by an agency to track any type of incoming and outgoing correspondence or packages | 1 | | 1 | | | |

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| 5.1.017 | 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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| 5.2.001 | 05.200.10 | Section 5.2 - Facility Management Records | | | | | | |
| | | 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 | |
| 5.2.002 | 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. | |

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| 5.2.003 | 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. | | |
| 5.2.003 | 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 | | |
| 5.2.004 | 05.204.10 | Building Space Requests | 1 | | 1 | | | | |
| 5.2.005 | 05.205.10 | Calibration Records (Equipment or Instrument) | 10 | | 10 | | | | |
| 5.2.006 | 05.206.10 | Certificate of Destruction of Property | FE+3 | | FE+3 | | | | |
| 5.2.007 | 05.207.10 | Damage Reports | FE+3 | | FE+3 | | | | |
| 5.2.008 | 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 | | |

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| | | equipment. Includes requests for installation, moves, service, etc.; and service/repairs logbooks, etc. | | | | | | |
| 5.2.009 | 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 | | | |
| 5.2.010 | 05.210.10 | Equipment Manuals | LA | | LA | | | |
| 5.2.011 | 05.211.10 | Equipment Warranties | AC+1 | | AC+1 | AC = Expiration of Warranty. | | |
| 5.2.012 | 05.212.10 | Estimate Files (Supply & Repair Cost Estimates) | 1 | | 1 | | | |
| 5.2.014 | 05.213.10 | Inventory – Annual Physical | FE+3 | | FE+3 | | | |
| 5.2.015 | 05.214.10 | Notice of Equipment Removed From Inventory | FE+3 | | FE+3 | | | |

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| 5.2.016 | 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 | | |
| 5.2.017 | 05.216.10 | Lost and Stolen Property Report | FE+3 | | FE+3 | | | |
| 5.2.018 | 05.217.10 | Quality Control Reports | 2 | | 2 | | | |
| 5.2.019 | 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 | | | |
| 5.2.020 | 05.219.10 | Supply Usage Records | FE+1 | | FE+1 | | | |
| 5.2.021 | 05.220.10 | Surplus Property Sale | FE+3 | | FE+3 | | | |
| 5.2.022 | 05.221.10 | Utility Reports | AV | | AV | Includes Energy Management Reports | | |

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| 5.2.023 | 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 | | | |
| 5.2.024 | 05.223.10 | Material Specifications | AC+2 | | AC+2 | | AC = Material is no longer in the agency. | |
| 5.2.025 | 05.224.10 | Equipment Descriptions and Specifications | AC+2 | | AC+2 | | AC = Equipment is no longer in the agency. | |
| 5.2.026 | 05.225.10 | Facilities Reservation Logs | 2 | | 2 | | From date of event. | |
| 5.2.027 | 05.226.10 | Space Utilization Reports | AV | | AV | | | |
| 5.2.028 | 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 | |

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| | 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. | | |
| | | Section 5.3 - Purchasing | | | | | | |
| 5.3.002 | 05.300.10 | Freight Bills Paid | FE+3 | | FE+3 | | | |
| 5.3.003 | 05.301.10 | Freight Claims | AC+2 | | AC+2 | AC=Resolution of claim | | |
| 5.3.004 | 05.302.10 | Orders – Acknowledgments | AV | | AV | | | |
| 5.3.005 | 05.303.10 | Packing Slips | AV | | AV | | | |
| 5.3.007 | 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 | | |

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| 5.3.008 | 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. | | |
| 5.3.009 | 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 | | |

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| 5.4.001 | 05.400.10 | Section 5.4 – Risk Management Accident Reports and Associated Documentation – Accident or occupational disease reports (by | CE+5 | | CE+5 | Includes Workers Compensation Reports. | | |
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| | | 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 | | |
| 5.4 | 05.401.20 | Workers' Compensation Claim Files | AC | | AC | AC=Death of Claimant. Files maintained by System Workers' Compensation Office | | |
| 5.4.002 | 05.402.10 | Evacuation Plans | US | | US | | | |
| 5.4.003 | 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. | | |

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

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| 5.4.013 | 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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| 5.5.001 | 05.500.10 | Section 5.5 - Telecommunications 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. | | |
| 5.5.002 | 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 | | | |

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| | | long distance facsimile or electronic transmissions. | | | | | | |
| 5.5.003 | 05.502.10 | Station Activity Reports – Internal listing of incoming/ outgoing telephone activity to individual telephone stations. | AV | | AV | | | |
| 5.5.004 | 05.503.10 | System Activity Reports – Internal listing of all incoming/outgoing agency telephone activity. | AV | | AV | | | |
| 5.5.006 | 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 | | |

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| 5.5.007 | 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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| | | Section 5.6 - Vehicles | | | | | | |
| 5.6.001 | 05.600.10 | Airplane Flight Logs (State-owned) | LA+3 | | LA+3 | | | |
| 5.6.001 | 05.600.20 | Airplane Flight Logs (Leased) | FE+3 | | FE+3 | | | |
| 5.6.002 | 05.601.10 | Airplane Passenger Lists | FE+3 | | FE+3 | | | |
| 5.6.003 | 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. | | |
| 5.6.004 | 05.603.10 | License and Driving Record Check | AC | | AC | AC = Until superseded or until | | |

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| 5.6.005 | 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 | | |
| 5.6.007 | 05.605.10 | Vehicle Titles and Registrations | LA | | LA | | | |
| 5.6.008 | 05.606.10 | Pilot License Verification | AC+5 | | AC+5 | AC=Termination of Employment | | |
| 5.6.009 | 05.607.10 | Parking Permits or Assignments | US | | US | | | |

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| | 05.700.10 | Section 5.7 - Campus Security, Traffic & Parking 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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| | | | | | | 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 | | |

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| | | | | | | 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 | AC+10 | AC=Closed | | |
| | 05.712.10 | Student Safety Records (traffic appeals, etc.) | AC | 5 | AC+5 | AC=Settled | | |

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| | 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 | | | | | | |

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| | | Section 5.8 – Real Estate | | | | | | |
| | 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. | |

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| | 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. | | |

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| | 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. | | |

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| <u>STUDENT RECORDS</u> | | | | | | | | |
|--|-----------|------------------------------------|------|--|------|---|--|--|
| Section 6.1 - Admissions Data/Documents | | | | | | | | |
| | 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 | | |

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| | 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 | | |

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| | | Section 6.2 - Registration and Records Data/Documents | | | | | |
|--|-----------|--|------|--|------|---|--|
| | 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 | |

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| | 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 | | |

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| | 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 | | |

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| | 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 | | |

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| | 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 | | |

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| | | Section 6.3 – Certification Data/Documents | | | | | | |
| | 06.300.10 | Class Rolls – Certification | FE+5 | | FE+5 | | | |

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| | 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 | | |

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| | | Section 6.4 - Publications, Statistics, Institutional Reports | | | | | | |
| | 06.405.10 | Catalogs | PM | | PM | | | |
| | 06.401.10 | Commencement Program | PM | | PM | | | |
| | 06.402.10 | Degree Statistics | PM | | PM | | | |

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| | 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 | | | |

| | | Section 6.5 - Family Educational Rights and Privacy Act Data/Documents | | | | | | |
|--|-----------|---|------|--|------|--|---|--|
| | 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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|-------------|------------|-------------|--|--|--|--|--|
| Agency Code | 710 | Agency Name | The Texas A&M University System | | | | |
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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 | | |

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| | | Section 6.6 - Other Student-Related Records | | | | | | |
| | 06.600.10 | Student Counseling Records – Academic | AC+5 | | AC+5 | AC=Completed | | |

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| Agency Code | 710 | Agency Name | The Texas A&M University System | | | | | |
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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 | | | |

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

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

| Development Records | | | | | | | |
|----------------------------|-----------|--|------|--|------|---|--|
| | 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 | |

| <u>Section 7.2 - Dental Records</u> | | | | | | | |
|--|-----------|----------------|-------|--|-------|---|--|
| | 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 th | |

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

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