



Instructions for Completing Form SLR 122

Form SLR 122 must be used by all state agencies to submit an amendment to an approved (certified/recertified) agency records retention schedule (Texas Government Code, Chapter 441, §441.185). See for SLR 105C instructions for submission procedures. If you have any questions relating to completion of this form or SLR 105C, please contact the State and Local Records Management Division at (512) 463-7610.

Formatting:

When duplicating this form electronically, leave at least a ¼ inch in the top and left margins. Use 10 point font or larger for the data entered into the schedule. **Please do not use carriage returns within a field**, as this will affect the ability to import the information into TexLinx.

The SLR 122 is formatted to fit legal-size paper. You will have to adjust the column width if you plan on printing to standard-size paper.

Do not change, alter, add or delete any headings or columns in the template.

To freeze the column headings so that they continue to appear at the top of the page as you scroll, click View in the toolbar of the application. Select Normal from the options in the top left. Click to highlight row 4 on the left side of the screen. Click on Freeze Panes under View and select Freeze Panes (do **not** select Freeze Row). To return to the previous format, click Page Layout under View.

Entering Data:

Field 1 Enter the 3-digit code assigned to your agency.

Field 2 Enter the complete name of your agency.

Notes for Fields 3 – 14: New records series: Enter all information for fields 3 – 13; leave field 14 blank.

Changed records series: Enter all information for fields 3 – 14.

Obsolete records series: Enter fields 13 and 14.

Field 3 Enter the number that has been assigned by your agency to the corresponding records series. If the entry is for a new series, do not assign an agency item number that is assigned to another record series on the approved (certified/recertified) retention schedule. If an agency item number has been used for a series in the past, it cannot be reused.

Field 4 Enter the record series item number (RSIN) from the *Texas State Records Retention Schedule* (RRS). If the records series title is not included in the RRS, enter the number of the appropriate “Category” and “Section” from the RRS where it should be listed.



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Category and Section Numbers are at the top of the page in the RRS. If the records series cannot be matched to a category and section, then leave Field 4 blank.

- Field 5** Enter the official title of the records series (e.g., W-4 Forms, Labor Statistics Reports, Surety Bonds). The official title that you assign to the records series does not have to be the same as the records series title listed in the RRS.
- Field 6** Enter a description of the record series if the record series title is not self-explanatory.
- Field 7** If the retention period requires an event to begin the retention period (e.g., AC, FE + 3, US + 5), enter the retention code. Refer to the retention codes in the legend.
- Field 8** Enter the retention period the record series is to be retained, broken down into years, months, or days. For example, if a record series has a retention period of FE + 3 years, you would enter 3 into the years column in Field 8, and the FE code in Field 7.
- Field 9** If "AC" is used in Field 7, enter the event that begins the retention period (e.g. "AC = September 1 of odd-numbered calendar years.")
- Field 10** Using the archival codes at the bottom of the form, indicate the archival value, if applicable, of the records series:
A/I – Used with records series that will be transferred to the State/University Archives and do not require a prior review.
R/O – Used with records series that have undetermined archival value, and require a review by the State/University Archivist prior to being transferred to the State/University Archives.
- Field 11** Enter any agency policy, additional instructions, or other remarks relevant to the record series.
- Field 12** Enter any statute references or other legal citations that pertain to the series.
- Field 13** Enter a code for the type of series for each record series:
N – New to this edition of the schedule
C – Change to a previously appearing series
O – Obsolete series no longer in use at the agency
- Field 14** If the action being done to the record series is a change, please provide the agency item number that the series is currently assigned in your approved (certified/recertified) retention schedule.