



July 29<sup>th</sup> 2019

Laurie Gonzales  
Executive Assistant  
Texas Board of Law Examiners  
P.O. Box 13486  
Austin, TX 78711

Re: Agency records retention schedule approved for use.

Dear Ms. Gonzales,

Your agency's records retention schedule is approved for use as of July 15<sup>th</sup> 2019. Your currently approved records retention schedule is available on our website at <https://www.tsl.texas.gov/slrms/state/schedules.html>. Please ensure that all old copies of the schedule are superseded with this recertified copy.

Your approved retention schedule provides you with continuing authorization to dispose of agency records according to its terms. Please note that state regulations (13 TAC §6.8) require documentation of the final disposition of records by your agency. This requirement may be met by maintaining a disposition log or other evidence of the records series titles, dates covered, volume, and date of disposition. The destruction of any records of your agency not on your schedule requires special authorization from us.

Each agency schedule must be reviewed, updated and submitted for recertification annually for the first two years after the initial approval of the schedule and every five years thereafter. The deadline for submission of your schedule for its next recertification is the last working day of **July 2024**.

During a certification period, changes may need to be made to your schedule. State regulations (13 TAC §6.4) also allow for the submission of amendments to the retention schedule as needed to keep the information in the schedule current. If you are not familiar with the amendment process, or if you have any other questions, please contact the Government Information Analyst assigned to your agency, Andrew Glass at 512-463-2631 or [aglass@tsl.texas.gov](mailto:aglass@tsl.texas.gov).

Your efforts in developing a records retention schedule are appreciated. It not only helps to ensure the integrity of your recordkeeping practices, but it is also essential to the success of your records management program.

Sincerely,

Craig Kelso  
Director and State Records Administrator

cc: Agency head

Lorenzo de Zavala  
State Archives and  
Library Building

1201 Brazos Street  
Austin, Texas  
78701

P.O. Box 12927  
Austin, Texas  
78711-2927

[www.tsl.texas.gov](http://www.tsl.texas.gov)

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**TSLAC**

*Preserving yesterday  
Informing today  
Inspiring tomorrow*



# STATE OF TEXAS Records Retention Schedule Certification

SLR 105C

Form SLR 105 or SLR 122  
must accompany all  
submissions of this form.

## Section 1. Agency Information

(Submitting agencies complete this section only)

Agency Code 203

Agency Name Board of Law Examiners

(Check one)

- Initial Certification - Form SLR 105
- Recertification - Form SLR 105
- Amendment - Form SLR 122

I hereby certify that this records retention schedule was prepared in accordance with Texas Government Code, Chapter 441, Subchapter L.

(Check one)

- Agency Head
- Records Management Officer

Signature

Rebecca Henly

Name (Print or type) Rebecca Henly

Date June 30, 2017

## Section 2. Approvals

(Submitting agencies do not write in this section)

State Auditor's Office

(For the exclusive use of the State Auditor's Office)

Signature \_\_\_\_\_

Name (Print or type) \_\_\_\_\_

Date \_\_\_\_\_

**Not Required at This Time**

Texas State Library and Archives Commission

(For the exclusive use of the State Library and Archives Commission)

Signature

Gloria Mera

Name (Print or type)

Gloria Mera

Date

7/15/19

Cert/Recert No. 6

Amendment No. \_\_\_\_\_

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## CAUTION

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

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



# Records Retention Schedule

1. Agency Code: 203		2. Agency Name: TEXAS BOARD OF LAW EXAMINERS									
3. Agency Item No.	4. Record Series Item No.	5. Record Series Title	6. Description	7. Ret. Code	8. Retention Period			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
1		Analysts' Pending File	Information concerning potential applicants received before the submission of a Declaration or Application.	AV						Considered confidential, electronic record.	
2		Annual Bar Admission Form	Documents pertaining to annual luncheon hosted by BLE recognizing Supreme Court, State Bar of Texas leaders, Texas Young Lawyers Association leaders, Law School Deans, and agency Board members and staff.		2						
3		Applicant/Declarant Chemical Dependency Evaluation/Result Log	Log of evaluations including last submitted chemical dependency results about applicants and declarants. Historical and statistical significance.		50					Considered confidential.	
4		Board Orders	Copies of orders and/or stipulated agreements related to character and fitness matters issued to applicants and/or declarants.	PM						Considered confidential.	
5		Exam Questions Open	Texas essay exam questions; Procedure & Evidence questions given after February 1998.		50						
6		Exam answer books	Per Rule XI(i) of the Rules Governing Admission to the Bar of Texas, test answer booklets of examinees that failed the most recent Texas Bar Exam.	AC	1			Ending date of last 2 1/2 day bar exam given.		Considered confidential.	

<b>Retention Codes (field 7)</b> AC – See event trigger for specific records series definition AV – Administratively valuable CE – Calendar year end	FE – Fiscal year end LA – Life of Asset PM – Permanent US – Until Superseded	<b>Archival Codes (Field 10)</b> A/I – Transfer to State/University Archivist R/O – Review by State/University Archivist
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7		Files - Bar Exam Candidates Eligible to be Licensed	Law license application files wherein no probationary license was issued - - passed exam; met all licensing requirements; eligible to have license issued.	AC	5			Date license was issued.		Considered confidential.	
8		Files - Bar Exam Candidates Not Eligible to be Licensed.	Bar Exam candidate application files - - passed exam; has not met all licensing requirements.	AC	5			Date the application was received by the Board, date the license was issued, or date of last formal activity, whichever is later.		Considered confidential.	
9		Files - - Candidates for Admission without Exam ("AWOX")	Candidate application files - - attorney applicants from other states who qualify for admission w/o exam.	AC	5			Date the application was received by the Board, date the license was issued, or date of last formal activity, which ever is later.		Considered confidential.	
10		Files - - Candidates Granted Probationary License wherein no Regular License has been issued.	Probationary license application files.	AC	10			Date of last formal activity.		Considered confidential.	
11		Files - - Candidates Granted Probationary License wherein a Regular License has been issued.	Probationary license application files.	AC	10			Date the regular license was issued.		Considered confidential.	

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12		Files - - Inactive - - Declarant/Bar exam application files where an applicant has not applied for or passed any exam and has not met all licensing requirements.		AC	5			Date the application was received by the Board, date the license was issued, or date of last formal activity, which ever is later.		Considered confidential.	
13		Hearing Worksheets	Board deliberations concerning bar admission candidates' character and fitness hearings.	AV						Considered confidential.	
14		Investigation Reports for Department of Public Safety	Applicant background check report run after data entry.	AV						Accessed monthly, electronic record.	
15		Law Study Certification Notebooks (9)	Alphabetic lists provided by the Texas law schools to verify Juris doctor degree recipients and/or those falling within the "4 hour" rule.		50						
16		Lawful practice	Internal documentation of what constitutes lawful practice for the purposes of determining attorney eligibility.		15						
17		Multistate Bar Exam ("MBE") Score Transfer Requests	Information from and agency responses to previous bar exam candidates requesting that their MBE score be transferred to another state.	AV						Electronic record, considered confidential.	

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18		Multistate Professional Responsibility Examination (MPRE) Master List Notebooks	Lists provided by NCBE of examinees who requested their MPRE score to be submitted to Texas.		6					Electronic record, considered confidential.	
19		Potential Hearings Reports - - Investigations			50				R	Historical and statistical significance. Consider confidential.	
20		Pre-Certification Reports for AWOX/SFX Files - - Internal Tracking Log	Report generated to determine Licensure eligibility for AWOX/SFX candidates.		75					Historical significance.	
21		Previous Exam Result List(s)	Alphabetic list of bar exam candidates who are successful/eligible to be licensed, successful/not eligible to be license, and unsuccessful.		75					Some information considered confidential.	
22		Probationary License	Notes and documentation concerning Probation License process.	AV							
23		Records Division Delivery Receipts	Yellow agency final copy.	AV						Electronic Record.	
24		Reinstatement	Interaction between agency and State Bar of Texas (SBOT) concerning and admittance rules and disciplinary rules.		15						
25		Reports - - Notification date deadline analysis.	Reports generated to determine when the investigation should/must be completed per statutory requirements.	AV						Considered confidential.	

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					Years	Months	Days				
26		Rules Governing Admission to the Bar of Texas	Includes any/all proposed and Supreme Court-approved rule changes and revisions.	PM							
27		Short Form Exam Notebooks (2)	Record of detailed score breakdown for every SFX.		50					Historical and statistical significance. Consider confidential.	
28		TBE Testing Accommodations (NTA)	Alphabetic listing of NTA bar exam candidates' names and testing accommodations requested and ultimately granted.	AV						Considered confidential.	
29		Travel Management	Information about employees that travel on agency business.	FE	3						
30	1.1.006	Complaint/Compliment File	Complaints and/or compliments from the public concerning the agency.	AC	2			Receipt of compliment or final disposition of complaint.		CAUTION: If a complaint becomes the subject of litigation, it must be included in and is subject to the minimum retention period of item number 1.1.048.	

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31	1.1.007	Correspondence Administrative	Documentation outlining changes of agency policies and procedures.		4				R	<p>Considered vital.</p> <p>ARCHIVE NOTES: Only the administrative correspondence of executive staff, board or commission members, division directors and program heads require archival review. Contact the State Archives when these records have met their retention period.</p> <p>CAUTION: This record 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 1.1.011.</p>	
32	1.1.008	Correspondence General	Correspondence sent to and received from various sources.		2						

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33	1.1.008	Internal Communications	Communication between agency departments.	AC	2			Purpose of record has been fulfilled.			
34	1.1.008	Law Schools	Agency interactions with Law Schools.		15					Considered confidential.	
35	1.1.008	Old/New Memos	Office interagency memorandums.		2					Considered confidential.	
36	1.1.008	Outside Inquiries	Notes and correspondence from 3rd parties concerning agency processes.	AC	5			After inquiry has been fulfilled.			
37	1.1.008	Requests from Character and Fitness Information			10						
38	1.1.008	State Bar of Texas	Agency interaction with the SBOT.	AC	3			Purpose of action has been fulfilled.		Some information may be confidential.	
39	1.1.014	Legal Opinions and Advice	Atty. Gen. opinions requested, includes any requests eliciting the opinion.	AV					R		
40	1.1.014	Outside Counsel	Legal opinions or advice received from outside counsel, including request eliciting the opinion.		10				R	Does not include legal opinions or advice rendered on a matter in litigation or with regard to pending litigation (those may be 1.1.048, "Litigation Files").	
41	1.1.020	Open Records Requests - Approved Requests	Correspondence and documentation of requests for records that are furnished to the public..	AC	1			Date response sent.			
42		Pass Label/list Notebook	Written request and agency responses for mailing labels and/or lists of bar exam candidates.	AC	5			Date request was received by the Board.			

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					Years	Months	Days				
43	1.1.021	Open Records Requests - Denied Requests	Correspondence and documentation of requests for records that are exempt under the Public Information Act (Chapter 552, Government Code).	AC	2			Date response sent.			
44	1.1.024	Computer Project	Notes and documentation concerning computer upgrade project.	AC	3			Decision made to implement or not as a result of planning process.	R		
45	1.1.026	Texas Register Submissions	Copies of all open meeting notices; or any other documents required by law to be submitted to the Texas Register.	AC	1			End of FE in which published.			
46	1.1.027	Legislation	Documentation of legislation filed that affects the agency and/or its programs/projects and related correspondence.		6						
47	1.1.048	Litigation updates	Current BLE litigation.	AC	2			As applicable, decision of agency not to file a lawsuit or decision that a lawsuit will not be filed against it on a matter, dismissal of a lawsuit for want of prosecution or on motion of the plaintiff, or final decision of a court (or of a court on appeal, if applicable) in a lawsuit.	R		

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48	1.1.056	Information on Testing Accommodations	Information concerning each exam administration, policies, physicians list, litigation/A.D.A., and petition forms.		20					Considered confidential.	29 CFR 35.105(c).
49	1.1.057	Transitory Information	<p>Records of temporary usefulness that are not an integral part of a record series of an agency, that are not regularly filed within an agency's recordkeeping system, and that are required 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 ongoing records series.</p> <p>Transitory records are not essential to the fulfillment of statutory obligations or to the documentation of agency functions. This series is for routine information used for communication, but not the documentation, of a specific agency transaction.</p>	AC				Purpose of record has been fulfilled.			

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					Years	Months	Days				
50	1.1.058	Meeting Agendas		PM					A	Agency retains permanent record copy. The archival requirement will be met by sending a copy to the Archives & Information Services Division, Texas State Library and Archives Commission.	
51	1.1.058	Meeting Minutes	Minutes taken at board meetings and panel hearings.	PM					A	Agency retains permanent record copy. The archival requirement will be met by sending a copy to the Archives & Information Services Division, Texas State Library & Archives Commission. Considered vital.	
52	1.1.059	Executive Session Minutes	Certified agenda minutes taken of portions of board meetings and panel hearings that are closed to the public.	PM						Considered vital & confidential.	
53	1.1.063	Staff Meetings	Minutes or notes, and supporting documentation, taken at internal agency staff meetings.		1						

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					Years	Months	Days				
54	1.1.065	Hearing Statistics			50				Does not include source documentation used for information or data included in or directly related to another record series related to documentation of agency performance measures. Considered vital & confidential.		
55	1.1.065	Statistical Information Confidential	Exam/Grade folders.	PM					Does not include source documentation used for information or data included in or directly related to documentation of agency performance measures. Considered vital & confidential.		
56	1.1.065	Statistical Information - - Open	Statistics related to the Texas Bar Exam, the Multistate Bar Exam, attorneys admitted to w/o exam and/or the SFX.	PM					Does not include source documentation used for information or data included in or directly related to documentation of agency performance measures. Considered vital.		

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57	1.1.066	Reports - - Biennial or Annual Agency financial reports.		AC	6			September 1 of odd-numbered calendar years.	A	Agency retains original. Report sent to Gov., State Comptroller, Legislative Budget Board, and State Auditor.  ARCHIVES NOTE: The archival requirement is met by sending the required copies of the reports to the Texas State Publications Depository Program, Texas State Library and Archives Commission.	
58	1.1.067	Reports Consultants and Committees	Reports from Risk Management, Sunset Committee, and State Auditors.		10				R		
59	1.1.067	Weekly Certification Reports	Alphabetic list of candidates eligible to be issued a law license by Supreme Court Clerk's office.		75				R	Considered vital.	
60	1.1.070	Administrative Procedures for Exams		AC	3			Termination of procedures.	R	Considered vital.	
61	1.1.070	Eligibility and Examination Procedure Manual	Detailed explanations of all Eligibility and Examination procedures.	US	3				R	Used daily. Amended frequently. Considered vital.	
62	1.1.011	Policy Memos	Memos from management to staff regarding policies and procedures.	US	3				R	Considered vital.	
63	3.3.025	Receptionist Procedure Notebook	Detailed operating procedures for the Receptionist.	US	3					Considered vital.	
64	1.2.001	Destruction Sign-offs		FE	3						

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65	1.2.005	Records Retention Schedule (SLR105)		US						Agency copy.	
66	1.2.006	Records Transmittal Forms (RMD 101)	Includes index of files and stored boxes.	AC	2			Date of authorization for destruction, permanent transfer from storage, or transferred to the Archives & Information Division, Texas State Library & Archives Commission, by the agency records administrator.		Agency copy.	
67	1.2.008	Request for Authority to Dispose of State Records (RMD 102)		FE	3					Original is retained by the State and Local Records Management Division, Texas State Library & Archives Commission.	
68	1.2.010	Records Disposition Logs	Listing of records destroyed that show series, dates of records, and date destroyed.		20					Historical significance.	
69	1.2.011	Records Center Storage Approval Forms (RMD 106)		US						Agency Copy.	
70	1.2.013	Archives Cross-Reference List	Alphabetical listing of licensees identifying where the licensee file is stored.	PM							

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72	2.1.007	Software Programs	Electronic storage devices containing Microsoft Access, Lotus 123, Microsoft Word 2000, XL, Adobe Acrobat 4 and 5, Word Perfect 8, Quicken, Zetafax, and PowerPoint.	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.		Considered vital.	13 TAC 6.94
73	2.1.008	Hardware Documentation	Operational manuals for each personal computer, printer, and/or server(s).	AC				Until electronic records are transferred to and made usable in a new hardware environment or there are no electronic records being retained to meet an approved retention period that require the hardware to be retrieved and read.		Considered vital.	13 TAC 6.94
74	3.1	Personnel	Files for current employees containing personnel information; records documenting the selection process; W-4; payroll; performance reviews; performance appraisals.	AC	5			Termination date.		Considered vital. 3.1.002 3.1.014 3.2.005 3.1.019	

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75	3.1.001	Applications for Permanent Employment Not hired.	Applications, resumes, transcripts, letters of reference, and similar documents whose submission by candidates for vacant positions is required on the application form, by application procedures, or in the employment advertisement.		2						29 CFR 1602.31
76	3.1.011	Employee Insurance Records	Separate files for current employees containing benefits, insurance, and ERS general information.	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.
77	3.1.012	Employment Advertisements	Internal or external announcements or advertisements of job openings, promotions, training programs, or opportunities for overtime.		2						29 CFR 1602.31
78a.	3.1.013	Employment Contracts	a) executed, renewed or amended on or after 9/1/15.	AC	7			Expiration or termination of the contract according to its terms.		Considered vital.	Gov. Code 441.1855

<b>Retention Codes (field 7)</b> AC – See event trigger for specific records series definition AV – Administratively valuable CE – Calendar year end	FE – Fiscal year end LA – Life of Asset PM – Permanent US – Until Superseded	<b>Archival Codes (Field 10)</b> A/I – Transfer to State/University Archivist R/O – Review by State/University Archivist
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# Records Retention Schedule

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3. Agency Item No.	4. Record Series Item No.	5. Record Series Title	6. Description	7. Ret. Code	8. Retention Period			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
78b.	3.1.013	Employment Contracts	b) executed, renewed, or amended on or before 8/31/15.	AC	4			Expiration or termination of the contract according to its terms.		Considered vital.	Gov. Code 441.1855
79	3.1.023	Position/Job Descriptions		AC	4			Until superseded or job eliminated.		Considered vital.	40 TAC 815.106(i).
80	3.1.027	Training Records	Certificates of completion, transcripts, test scores, or similar records documenting the training, testing, or continuing education achievements of an employee.	AC	5			Termination of employment.			
81	3.1.029	Employment Eligibility, Documentation or Verification of	I-9 Forms.	AC	1			3 years after date of hire or 1 year after termination date, whichever is later.		Considered vital.	8 CFR 274a.2(b)(2)(i)(A) and (c)(2).
82	3.2.002	Previous Employee Payroll Records		AC	7			Termination date.		Considered vital.	40 TAC 815.106(i).
83	3.2.003	Federal Tax Records	Includes 1099, W2, FICA, and other tax records.	AC	7			Tax due date, date the claim is filed, or date tax is paid, whichever is later.		Considered vital.	29 CFR 31.6001 - 1(e)(2).
84	3.2.010	Human Resources Information System (HRIS) Reports		AC	4			Date of receipt of updated report from HRIS.		Considered vital	
85	3.3.011	Former Employee Verification Records	Information needed to verify employment; name, Social Security number, exact dates of employment, last known address and most recent public access option form.	AC	75			Termination of employment.			

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					Years	Months	Days				
86	3.3.024	Policies and Procedures Manuals	BLE manual issued to staff.	US	3				R	Considered vital.	
87	3.3.030	Training Records - Administration	Instructional materials and other records associated with in-house training of agency personnel on personnel policies and procedures that govern an agency's programs, services, or projects.	US	5					Considered vital.  CAUTION: Does not include hazardous material training records.	
88	3.3.031	EEO Reports	Equal Employment Opportunity (EEO) Survey and employee data needed to complete.		3					Considered vital.	29 CFR 1602.32, 1602.39, 1602.41, 1602.48, and 1602.50.
89	3.4.004	Compensatory Time Accrual Authorization		FE	3						
90	3.4.006	Time Cards and Time Sheets		CE	4					Timesheets/timecards contain information pertaining to length and type of leave taken and leave balances by type.	40 TAC 815.106(i).
91	3.4.007	Time Off and/or sick Leave Requests		FE	3						
92	3.4.008	Sick Leave Pool Documentation		PM							
93	4.1.001	Accounts Payable	Records of payments made to vendors	FE	6						
94	4.1.006	Investment transaction files	Investment/Banking records.	FE	6					Considered vital.	

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					Years	Months	Days				
95	4.2.001	Cash deposit vouchers	Daily Deposit Proof/Fee Reports used to verify data entry of monies received.	FE	6					Considered vital.	
96	4.2.005	Prior Fiscal Year Purchase Orders	Record of purchases with documentation.	FE	6						
97	4.5.001	Budget Category Worksheets	Detailed worksheets completed by senior staff members concerning individual categories within the budget.	FE	3						
98	4.5.002	Internal fiscal management reports	Monthly financial statements.	FE	6					Considered vital.	
99	4.5.006	Fiscal Year Budgets	Includes any/all proposed and Supreme Court-approved miscellaneous orders outlining each fiscal years projected operating budget and/or amendments.	FE	6						
100	4.7.001	Accounting Procedures Manuals	Encompasses Accounting procedures, purchasing procedures, and mail check-in procedures.	US	3					Considered vital.	
101	4.7.002	Bank Statements		FE	6					Considered vital.	
102	4.7.004	Asset History File	Records on purchase and ownership of vehicle and major agency equipment, including manuals.	LA	3						
103	4.7.004	Modular Furniture File	Notes and documentation concerning purchase, installation, and maintenance of modular furniture.	LA	3						

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					Years	Months	Days				
104	4.7.011	Texas Facilities Commission statements		FE	3						
105	4.7.012	Credit Card File	File of information concerning employees who have been issued an agency credit card.	AC	3			US + FE			
106	4.7.012	Long Distance Information	File of information concerning employee who have been issued an agency AT&T Long Distance Calling Card.	AC	3			US + FE			
107	5.1.004	Address/Phone lists	List of addresses, telephone, fax, and email addresses for agency staff, Board members, and law school administrative staff.	US						Considered confidential.	
108	5.1.005	Postage Expense Reports	Postage meter/business reply mail and daily logs.	FE	6						
109a.	5.1.013	Insurance Policies	For vehicle, equipment, etc. (a) executed, renewed or amended on or after 9/1/15.	AC	7			Expiration or termination of the policy according to its terms.		Considered vital.	Gov. Code 441.1855
109b.	5.1.013	Insurance Policies	For vehicle, equipment, etc. b) executed, renewed or amended on or before 8/31/15.	AC	4			Expiration or termination of the policy according to its terms.		Considered vital.	Gov. Code 441.1855

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					Years	Months	Days				
110	5.1.014	Manuals and Procedures	Bi-annual List of proctors hired to assist agency staff and monitoring the bar exam administration. Instructional manuals distributed to prepare for administering exams. Telephone scripts and call routing manuals. Mail Check In training manual.	US	1						
111	5.1.015	Acknowledgment Letter Log	Log of dates when letters to examinees acknowledging receipt of the declaration and/or application are run.		1					Considered confidential.	
112	5.1.015	Reception Delivery Log	Record of items delivered by U.S. Postal Service, overnight and local delivery services when a signature is required.		1					Electronic record.	
113a.	5.2.008	Equipment History File	Includes requests for installation, moves, service, etc.	LA	3					For service agreements or contracts related to equipment repairs and services, retain in accordance with item number 5.1.001.	Gov. Code 441.1855
113b.	5.2.008	Equipment Service Agreements	Includes requests for service/repair, logbooks, etc.	LA	3					For service agreements or contracts related to equipment repairs and service, retain in accordance with item number 5.1.001.	Gov. Code 441.1855
114	5.2.014	Inventory	Property, equipment, supply verification.	FE	3						

**Retention Codes (field 7)**

AC – See event trigger for specific records series definition  
 AV – Administratively valuable  
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**Archival Codes (Field 10)**

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

# Records Retention Schedule

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3. Agency Item No.	4. Record Series Item No.	5. Record Series Title	6. Description	7. Ret. Code	8. Retention Period			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
115a.	5.3.007	Bid Documentation - contract executed, renewed or amended on or after 9/1/15	Includes bid requisition/authorizations, invitations to bid or propose, bid specifications, successful or unsuccessful bids, and bid tabulation/evaluations.	AC	7			Expiration or termination of the instrument according to its terms or decision not to proceed with the bid.			Gov. Code 441.1855
115b.	5.3.007	Bid Documentation - contract executed, renewed or amended on or before 8/31/15	Includes bid requisition/authorizations, invitations to bid or propose, bid specifications, successful or unsuccessful bids, and bid tabulation/evaluations.	FE	3						Gov. Code 441.1855
115c.	5.3.007	Bid Documentation -	Unsuccessful bids that do not meet agency submission requirements and are not included in bid evaluation process.	AC	2			Date of notification of denial or date of withdrawal, as applicable.			Gov. Code 441.1855
116	5.3.008	Purchase Voucher Number Log	Used and available purchase order numbers (by fiscal year).	FE	3						
117	5.3.009	Requests for Information	Requests for information preliminary to the procurement of goods or services by direct purchase or bid.	AC				Decision not to proceed with the procurement.		CAUTION: If the request for information leads to request for proposal or bid, the request for information should be retained in accordance with item number 5.3.007.	Gov. Code 441.1855
118	5.4.012	Security Access Records	Employee I.D. Forms, parking, building access, memos, reports, key lists, and Department of Public Safety reports.	AC	2			Until superseded, date of expiration, or date of termination, whichever is sooner.		Considered vital.	

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					Years	Months	Days				
119	5.4.013	Disaster Preparedness and Recovery Plan		US						Considered vital.	
120	5.5.003	Telecommunication Information/D.I.R.	Information about inter-office telephone stations. Agency phone and voicemail systems.	AV							
121	5.6.003	Inspection Repair and Maintenance Records - Vehicles	Vehicle maintenance.	LA	1						
122	1.1.002	Audits	Audits and reviews performed by or on behalf of an agency, including the working papers that support the audit. Also includes audits performed on the agency.	AC	7			Publication or release of final audit findings.		The State Auditor's Office retains any copies of its audits performed on Texas state agencies.	
123	1.1.074	Sunset Review Report and Documentation		AC	3			After the subsequent Sunset Review.	R		
124	3.2.002	Current Employee Payroll Records		AC	7			Termination date.		Considered vital.	40 TAC 815.106(i).
125	1.1.023	Organization Charts		US					A		
126	1.1.062	Meetings-Supporting Documentation	Documents submitted at meetings of state boards, commissions, committees, and councils including exhibit items, documentation for agenda items, etc. Includes documents sent in advance of meetings for briefing purposes, some of which may not be submitted at an actual meeting.		2				A	SEE caution comment at item number 1.1.058.	

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					Years	Months	Days				
127	1.1.073	Administrative Hearings	Transcripts and final decisions of hearings conducted as part of the regulatory process, and hearings on proposed rules and changes. The records may be maintained with related information including meeting notices, proofs of publication, and meeting minutes.	AC	3			Last action.	R		

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3. Agency Item No.	4. Record Series Item No.	5. Record Series Title	6. Description	7. Ret. Code	8. Retention Period			9. AC Definition			
					Years	Months	Days				
128	1.3.001	State Publications	Limited to web-published materials only, as we do not create or distribute any printed materials	AC	2			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 retention.  For additional information and requirements concerning state publications made available to the public through the Internet, consult the administrative rules of the Texas State Publications Depository Program of the Texas State Library and Archives Commission (13 TAC §§3.1-3.16)		

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					Years	Months	Days				
129	3.1.018	Grievance Records	Records relating to the review of employee grievances against personnel policies, working conditions, etc.	AC	2			Final decision on the grievance.	CAUTION: Does not include formal complaints filed by an agency employee with the Equal Employment Office (EEO) of the U. S. Department of Labor. SEE item number 1.1.048.		
130	3.1.026	Criminal History Checks	Criminal history record information on job applicants or agency employees obtained from the Department of Public Safety (DPS)	AC				The criminal history record has served the immediate purpose for which it was obtained.	CAUTION: An agency that is authorized to obtain a criminal history record information from DPS must refer to its agency's legislation or see Subchapter F, Chapter 411, Government Code for appropriate retention and use of this information.		
131	3.2.001	Employee Deduction Authorizations	Documentation used to start, modify, or stop all voluntary or required deductions from payroll, including garnishment or other court-ordered attachments.	AC	4			After termination of employee or after amendment, expiration, or termination of authorization, whichever sooner.			
132	3.2.008	Direct Deposit/Authorizations		US							

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					Years	Months	Days				
133	3.2.009	State Deferred Compensation		AC	5			All accounts with a vendor or vendors for the individual participant have been closed.		For instructions regarding the determination of the closure of accounts and for additional information regarding the retention period see the most current edition of the Benefits Coordinator Reference Manual issued by the Employees Retirement System of Texas.	
134	3.4.002	Leave Status Reports	Cumulative report is issued each pay cycle and provides employee leave status information for each position.	FE	3						
135	3.4.004	Overtime Authorizations			2						
136	4.1.005	Inventory & Other Cost Files	Production, job, labor, quotes, pricing, specifications, etc.	FE	3						
137	4.2.007	Expenditure Vouchers	Travel, payroll, etc.	FE	3						
138	4.4.001	General & Subsidiary Ledgers		FE	3						
139	4.4.002	Accounts Receivable Ledgers		FE	3						
140	4.4.003	Accounts Payable Ledgers		FE	3						

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					Years	Months	Days				
141	4.5.003	Annual Financial Reports	Required by the General Appropriations Act (100 Day Report).	AC	6			September 1 of odd-numbered calendar years.		CAUTION: If an agency does not produce a biennial or annual narrative report as described in item number 1.1.066, then these annual financial reports must be marked with Archival Code A. The archival requirement, when a biennial or annual narrative report is not produced, is met by sending the required copies of the reports to the Texas State Publications Depository Program, Texas State Library and Archives Commission.	

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					Years	Months	Days				
142	5.1.001	Contracts & Leases	Contracts, leases, and agreements include general obligation, land lease, utilities, and construction except for buildings. Documents include specifications, affidavits of publication of calls for bids, performance bonds, contracts, purchase orders, inspection reports, and correspondence. May also include other applicable documentation in the master contract file per Texas Comptroller of Public Accounts Contract Management Guide.	AC	7			Expiration or termination of the instrument according to its terms.		SEE related item numbers 3.1.035 Performance Bonds and 5.3.007 Bid Documentation. SEE item number 5.2.028 for building construction contracts and item number 5.1.017 for contract logs.	Government Code, 441.1855
143	1.3.002	Publication Development Files	Background material, copy (drafts), original artwork, photo negatives, prints, flats, etc. This includes all work performed both inside and outside the agency.	AV					R		

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