



June 27, 2018

Gloria Meraz  
Assistant State Librarian  
Texas State Library and Archives Commission  
1201 Brazos Street  
Austin, Texas 78701

Re: Agency records retention schedule approved for use.

Dear Gloria Meraz,

Lorenzo de Zavala  
State Archives and  
Library Building

Your agency's records retention schedule is approved for use as of June 25, 2018. Your currently approved records retention schedule is available on our website at <https://www.tsl.texas.gov/slrn/state/schedules.html>. Please ensure that all old copies of the schedule are superseded with this recertified copy.

1201 Brazos Street  
Austin, Texas  
78701

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.

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

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 June 2023.

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

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, Megan Carey at 512-463-5494 or [mcarey@tsl.texas.gov](mailto:mcarey@tsl.texas.gov).

*Commission Chairman*  
Michael C. Waters

*Members*

Sharon T. Carr  
F. Lynwood Givens  
Larry G. Holt  
Martha Wong

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.

*Director and Librarian*  
Mark Smith

Sincerely,

Craig Kelso  
Director and State Records Administrator

*Assistant State Librarian*  
Gloria Meraz

cc: Agency head

**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 306

Agency Name TEXAS STATE LIBRARY AND ARCHIVES COMMISSION

(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 [Handwritten Signature]

Name (Print or type) Donnie Osborne

Date 9/28/17

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, Date (Not Required at This Time)

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

Signature, Name, Date (Gloria Meraz, 6/25/18)

Cert/Recert No. 9 Amendment No. [Blank]

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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.**





**STATE OF TEXAS**  
**Records Retention Schedule**

SLR 105  
Rev. 2017-07

Retention Codes (field 7)

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 US – Until Superseded

Archival Codes (Field 10)

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

1. Agency Code:		2. Agency Name:									
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				
1B.001	4.7.001	Accounting Policies and Procedures Manual		US	3					VITAL RECORD	
1B.002	4.5.003	Annual Financial Reports (AFR)	Required by the General Appropriations Act (100 Day Report).	AC	6			AC = September 1 of odd-numbered calendar years.		CAUTION: If an agency does not produce a biennial or annual narrative report as described in Agency Item Number 8.050, 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, TSLAC. Previously 8.036	
1B.009	4.2.003	Cash Receipts Log	Daily listing of checks/money orders received by mail in payment for goods and services.	FE	3						



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1B.010	4.3.002	Cash Deposit Voucher Logs	Log of sequential numbering system required for deposit documents entered in Uniform Statewide Accounting System (USAS); document type D.	AC	3			AC = After submission of the last expenditure report for the final year of each LSTA 5-year plan.		Non-grant records will be destroyed at the same time as grant records. Check with ARIS, TBP, and LDN before destruction to ensure all records necessary to fulfill federal requirements are included in the corresponding grantee files.	2 CFR §200.333
1B.011	4.2.001	Cash Deposit Vouchers	Deposit vouchers and supporting documentation of cash receipts entered in Uniform Statewide Accounting System (USAS) and deposited in the State Treasury.	AC	3			AC = After submission of the last expenditure report for the final year of each LSTA 5-year plan.		Non-grant records will be destroyed at the same time as grant records. Check with ARIS, TBP, and LDN before destruction to ensure all records necessary to fulfill federal requirements are included in the corresponding grantee files.	2 CFR §200.333
1B.015	4.7.007	Index Code Sheets	Detail of Uniform Statewide Accounting System (USAS) reporting levels and methods of finance by division.	FE	3					VITAL RECORD	



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					Years	Months	Days					
1B.018	4.2.004	Encumbrance Documents	Orders, statements, change orders, etc.	AC	3			AC = After submission of the last expenditure report for the final year of each LSTA 5-year plan.		Non-grant records will be destroyed at the same time as grant records. Check with ARIS, TBP, and LDN before destruction to ensure all records necessary to fulfill federal requirements are included in the corresponding grantee files.	2 CFR §200.333	
1B.019	4.3.003	Expenditure Document Logs	Logs of sequential numbering system required for payment documents entered in Uniform Statewide Accounting System (USAS) including, but not limited to document types 1, 2, 9, and T.	AC	3			AC = After submission of the last expenditure report for the final year of each LSTA 5-year plan.		Non-grant records will be destroyed at the same time as grant records. Check with ARIS, TBP, and LDN before destruction to ensure all records necessary to fulfill federal requirements are included in the corresponding grantee files.	2 CFR §200.333	



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1B.020	4.2.007	Travel: Expenditure Vouchers	Employee's travel vouchers, supporting documentation, and records of reimbursement by the agency.	AC	3			AC = After submission of the last expenditure report for the final year of each LSTA 5-year plan.		Non-grant records will be destroyed at the same time as grant records. Check with ARIS, TBP, and LDN before destruction to ensure all records necessary to fulfill federal requirements are included in the corresponding grantee files.	2 CFR §200.333
1B.025	3.3.022	Payroll: Multiple Worksite Report	Reports pertaining to employees or completed U.S. Department of Labor Form BLS3020 and supporting documentation submitted to Texas Workforce Commission (TWC) or its predecessor.	CE	3						
1B.030	4.7.008	Grants: Federal Grants/Indirect Cost Allocation Plans	Documentation of indirect cost calculations and plan submitted to federal grant agencies.	AC	3			AC = The date of submission of the last expenditure report for the final year of each 5-year plan.		CAUTION: Retention requirements may vary depending on the specific federal funding agency. Agencies must ensure that records are retained for the appropriate retention period.	2 CFR §200.333



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					Years	Months	Days				
1B.031	4.2.006	Budget: Expenditure, Transfer, and Journal Vouchers	Uniform Statewide Accounting System (USAS) K and J documents and logs of sequential numbering system required for these document types.	AC	3			AC = The date of submission of the last expenditure report for the final year of each 5-year plan.		Non-grant records will be destroyed at the same time as grant records. Check with ARIS, TBP, and LDN before destruction to ensure all records necessary to fulfill federal requirements are included in the corresponding grantee files.	2 CFR §200.333
1B.036	4.5.006	Budget: Operating Budget Reports	Required by the General Appropriations Act. Workpapers and reports submitted to the Legislative Budget Board (LBB).	AC	3			AC = End of biennium in which the fiscal year falls.		CAUTION: Do not confuse this record series with the Annual Operating Budget held in EXEC. SEE Agency Item Number 8.002.	
1B.039	4.2.005	Payment Vouchers	Payment vouchers, requisitions, orders, receiving reports, invoices, or statements, change orders, etc.	AC	3			AC = After submission of the last expenditure report for the final year of each 5 year plan.		Non-grant records will be destroyed at the same time as grant records. Check with ARIS, TBP, and LDN before destruction to ensure all records necessary to fulfill federal requirements are included in the corresponding grantee files.	2 CFR §200.333
1B.047	5.6.007	Vehicle Titles & Registrations		LA							





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1B.054	4.7.012	Signature Authorizations	Signature cards or similar records establishing authority of an agency employee to initiate or authorize financial transactions on behalf of an agency.	AC	3			AC = US+FE		CONFIDENTIAL RECORD	
1B.058	4.7.008	Grants: Federal Grants - Cash Deposit Voucher Logs	Sequential numbering system log required for deposit documents entered in to Uniform Statewide Accounting System (USAS). USAS Document types D and JD.	AC	3			AC = After submission of the last expenditure report for the final year of each 5 year plan.		Check with ARIS and LDN before destruction to ensure all records necessary to fulfill federal requirements are included in the corresponding grantee files. SEE Agency Item Number 3A.023, 4.055, 4.056, or 4.057. CONFIDENTIAL AND VITAL RECORD	2 CFR §200.333
1B.076	4.7	Travel: State Travel Charge Card Records and Reports	Documentation of state travel charge cards issued to selected employees, reports from card administrator's online system regarding expenditures, and used for management purposes.	AC	3			AC = The date of submission of the last expenditure report for the final year of each 5-year plan.		CONFIDENTIAL RECORD	2 CFR §200.333



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1B.077	4.1.003	USAS: Cancelled Warrants Documentation	Supporting documentation for data entered in Comptroller's Treasury Operations Warrant Cancellation System. (USAS = Uniform Statewide Accounting System)	AC	3			AC = After submission of the last expenditure report for the final year of each 5 year plan.		Non-grant records will be destroyed at the same time as grant records. Check with ARIS, TBP, and LDN before destruction to ensure all records necessary to fulfill federal requirements are included in the corresponding grantee files.	
1B.078	4.1.008	USAS: Direct Deposit Payments Register	Uniform Statewide Accounting System (USAS) report - Detailed Account Financial Report (DAFR) 3691.	FE	3						
1B.079	4.3.003	USAS: Warrant Payments Register	Uniform Statewide Accounting System (USAS) report - Detailed Account Financial Report (DAFR) 3651.	FE	3						
1B.080	4.1.001	USAS: TINS Vendor and Grantee Documentation	Forms used to establish vendors and grantees in the Comptroller's Texas Identification Number System (TINS). (USAS = Uniform Statewide Accounting System)	FE	3					CONFIDENTIAL RECORD	



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					Years	Months	Days				
1B.083	3.2.003	Payroll and Accounting: Federal Tax Records	Includes 1099, W2, 941, Federal Insurance Contributions Act (FICA), Employee Wage and Tax Statements, Internal Revenue Service (IRS) Employers Quarterly Federal Tax Return, IRS Wage Levy Documents, any applicable supporting documentation, and other tax records.	AC 4				AC = After submission of the last expenditure report for the final year of each 5-year plan.		Non-grant records will be destroyed at the same time as grant records. Check with ARIS, TBP, and LDN before destruction to ensure all records necessary to fulfill federal requirements are included in the corresponding grantee files. CONFIDENTIAL RECORD	26 CFR §31.6001-1 (e) (2)
1B.084	4.7	Grants: Private Foundation and Other Alternatively Funded Grants	Includes copy of award letter, documentation of receipt of funds, deposit in the State Treasury, other associated revenue documents, electronic spreadsheets used to track receipts of signed contracts from grantees, payments made to grantees, and receipt of required financial status reports from grantees. Includes Gates Foundation Grant.	AC 3				AC = End of grant, then paper contracts and financial reports submitted by grantees are forwarded to LDN to be added to corresponding grantee project files.		SEE Agency Item Number 4.058. Paper payment documents are filed in Accounting, SEE Agency Item Number 1B.039. Previously 1B.035, 1B.070 VITAL RECORD	



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1B.085	4.7.008	Grants: Federal Grants - Institute of Museum and Library Services (IMLS) - LSTA	Includes all TSLAC grant programs funded by IMLS Library Services and Technology Act (LSTA). Including paper and electronic administrative cost documents, paper and electronic cash draw records, electronic tracking spreadsheet, electronic purchase vouchers and supporting documents for goods and services purchased by grant funds, Federal Form SF270, deposit/journal vouchers documenting receipt of revenue in State Treasury, and Financial Status Reports (FSR).	AC	3			AC = The date of submission of the last expenditure report for the final year of each 5-year plan.		Check with LDN before destruction to ensure all records necessary to fulfill federal requirements are included in the LDN grantee files, SEE Agency Item Number 4.055. CAUTION: If Texas Reads grant is paid through state monies, SEE Agency Item Number 1B.088. Other retention requirements may vary depending on the specific federal funding agency. Agencies must ensure that records are retained for the appropriate retention period. Previously 1B.059, 1B.060, 1B.063, 1B.068, 1B.069 VITAL RECORD	2 CFR §200.333



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					Years	Months	Days				
1B.086	4.7.008	Grants: Federal Grants - Institute of Museum and Library Services (IMLS) - Non-LSTA	Includes all TSLAC grant programs funded by IMLS grants other than Library Services and Technology Act (LSTA). Including paper and electronic administrative cost documents, paper and electronic cash draw records, electronic tracking spreadsheet, electronic purchase vouchers and supporting documents for goods and services purchased by grant funds, Federal Form SF270, deposit/journal vouchers documenting receipt of revenue in State Treasury, and Financial Status Reports (FSR).	AC	3			AC = The date of submission of the last expenditure report for the final year of each 5-year plan.		Check with LDN before destruction to ensure all records necessary to fulfill federal requirements are included in the LDN grantee files, SEE Agency Item Number 4.056. CAUTION: Other retention requirements may vary depending on the specific federal funding agency. Agencies must ensure that records are retained for the appropriate retention period. Previously 1B.061, 1B.064 VITAL RECORD	2 CFR §200.333



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					Years	Months	Days				
1B.087	4.7.008	Grants: Federal Grants - National Archives and Records Administration (NARA)/ National Historical Publications and Records Commission (NHPRC)	Includes paper and electronic administrative cost documents, paper and electronic cash draw records, electronic tracking spreadsheet, electronic purchase vouchers and supporting documents for goods and services purchased by grant funds, Federal Form SF270, deposit/journal vouchers documenting receipt of revenue in State Treasury, and Financial Status Reports (FSR).	AC	3			AC = The date of submission of the last expenditure report for the final year of each 5-year plan.		Check with ARIS before destruction to ensure all records necessary to fulfill federal requirements are included. SEE Agency Item Number 3A.023. 36 CFR 1207.42. CAUTION: Retention requirements may vary depending on the specific federal funding agency. Agencies must ensure that records are retained for the appropriate retention period. Previously 1B.062, 1B.065 VITAL RECORD	2 CFR §200.333



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1B.088	4.7.008	Grants: State Grants	Includes Lone Star Libraries, Texas Reads, Systems Negotiated Grant (SYNG), and other state funded grants. Contains electronic spreadsheets used to track receipts of signed contracts from grantees, payments made to grantees, and receipt of required financial status reports from grantees.	AC	3			AC = Satisfaction of all Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments (the Common Rule).		SEE Agency Item Numbers 1B.039 & 4.050. CAUTION: Retention requirements may vary depending on the specific funding agency Agencies must ensure that records are retained for the appropriate retention period. CAUTION: If Texas Reads grant uses federal monies, SEE Agency Item Number 1B.085. Previously 1B.071 VITAL RECORD	
1B.090	4.1	Vendor Direct Deposit Form	Records used to document the registration of vendors to conduct business with the State of Texas and the Texas State Library and Archives Commission (TSLAC).	AC	3			AC = Inactivation of vendor in Unified Statewide Accounting System (USAS) or direct deposit form superseded.			
1B.091	4.1	Invoicing and Statements (Accounts Receivable)	Includes all worksheets and detail information relating to invoices generated for services performed by the agency.	FE	7						



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1B.092	4.1.008	USAS: ITV Payments Register	Uniform Statewide Accounting System (USAS) Report - Detailed Account Financial Report (DAFR) 3741	FE	3						
1C.001	1.1.056	Americans with Disabilities Act (ADA) Documentation	Self-evaluations, ADA application, and plans documenting compliance with the requirements of the Americans with Disabilities Act.	AC	3			AC = Termination of employee.			28 CFR 35.105 (c)
1C.003	3.1	Agency Insurance Policies	Records include Director's and Officer's Liability and Volunteer Liability insurance policies through the State Office of Risk Management (SORM).	AC	4			AC = Termination of policy according to terms or resolution of outstanding employee claims.			
1C.006	1.2	Risk Management Correspondence and Reports	Related information and correspondence used in the management of our agency's risk management program not found in another records series in this schedule.	AV						VITAL RECORD	
1C.007	5.1.013	Insurance Policies	For vehicles, equipment, etc.	AC	7			AC = Expiration or termination of the contract according to its terms			Government Code, §441.1855





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					Years	Months	Days				
1D.001	1.2.005	Agency Approved Records Retention Schedule	Agency's Record Copy - Formerly Form RMD 105/105C. Includes the current approved retention schedule (Form SLR 105), signature approval page (Form SLR 105C), any amendments (Form SLR 122), all administrative correspondence to/from SLRM, and any additional forms designated by the State Records Administrator.	US						Original is retained by the SLRM Division of TSLAC, SEE Agency Item Number 5C.011.  Previously 3A.044	
1D.002	1.2.010	Agency Records Disposition Logs	Logs or similar records listing records destroyed or transferred to ARIS Division of TSLAC. Log includes records series title, agency item number, record inclusive dates, amount being destroyed, method of destruction, and date destroyed or transferred.	FE	10					Previously 3A.046	
1D.004	1.2.012	Records Inventory Worksheets		US						Previously 3A.050	
1D.005	1.2.014	Agency Records and Information (RIM) Program Records	Records management plans and similar records that establish the policies and procedures under which records and information are managed in an agency.	US	1					VITAL RECORD Previously 3A.071	



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1D.006	1.2.001	Agency Destruction Authorizations	Agency level documents authorizing final disposition of records under a certified records retention schedule. Bi-monthly disposition spreadsheet signed by the agency's Records Management Officer (RMO) showing approval to destroy.	FE	3					Previously 3A.072	
1D.007	1.1.072	Public Information Reports	Reports made to the Office of the Attorney General (OAG) on an agency's Public Information Act (PIA) request activity.	FE	2					Previously 3A.073	
1D.008	1.2.008	Request for Authority to Dispose of State Records (Form RMD 102) • Agency Copy		FE	3					CAUTION: Do not confuse this record series with other agency destruction requests. Original is retained by the SLRM Division of TSLAC, SEE Agency Item Numbers 5C.012, 5E.003, and 5E.004. SEE ALSO Agency Item Number 5C.103 for Local Government destruction requests. Previously 3A.076	



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1D.010	1.2	Agency's Retention Schedule Working Files and Justifications	Files created while working on the agency's retention schedule recertification or amendments. Also includes retention period justifications, explanations, and history of record series. .	AV						CAUTION: Be careful when disposing of retention period justification files. This documentation could be the only written explanation or history about particular records series and should be maintained, at minimum, as long as that record exists on the retention schedule	
1E.001	5.4.001	Accident Reports and Associated Documentation	Accident or occupational disease reports (by supervisors and employees) and other associated reports required to be submitted to the Texas Department of Insurance (TDI) or its predecessors or maintained internally on accident frequency.	CE	5					The Texas Department of Insurance (TDI) retains copies of the reports submitted to it for 50 years.	29 CFR §1904.33
1E.003	3.1.002	Applications for 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 advertisement.	AC	5			AC = Termination of employment.		CONFIDENTIAL AND VITAL RECORD	29 CFR §1602.31



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1E.004	3.1.001	Applications for 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.	FE	2						
1E.008	3.1.026	Criminal History Checks (Security Clearance)	Criminal history record information on job applicants or agency employees obtained from the Department of Public Safety (DPS).	AC				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. CONFIDENTIAL RECORD	



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1E.010	3.1.021	Personnel Disciplinary Action Documentation	Disciplinary actions are those actions which may affect pay, status, or tenure. They are imposed to discipline an employee whose conduct is harmful to the best interests of the state, the agency, or the employee work force; and for failure to improve performance or conduct following imposition of corrective action. May include cause for demotion, suspension, or dismissal, and the reasons for failure to give written notice of resignation. May also be used to document evidence of employee self-improvement efforts, as well as favorable and unfavorable communication.	AC	5			AC = Termination of employment.		Previously 2.038, 3A.042, 3C.029, 5.027, 8.074, 9.058 CONFIDENTIAL AND VITAL RECORD	
1E.011	5.6.004	Driving Record Verifications		AC				AC = Until superseded or termination of employment.			
1E.012	3.3.031	EEO-4 Reports and Work Papers	Includes documentation used to complete Equal Employment Opportunity (EEO) Reports and Dual Employment Reports.	FE	3						29 CFR §1602.32



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1E.013a	3.3	Employee Separation Survey	Surveys given to exiting employees (voluntary completion)	AC	2			AC = Termination of employment.			
1E.017	3.1.014	Employment Selection Records (EEO Folder)	Includes notes of interviews with candidates, questions asked of applicants, audio and videotapes of job interviews, driving record and previous injury checks, pre-employment physical examinations, pre-employment drug screening test results, polygraph examination results, and all other records that document the selection process. (EEO = Equal Employment Opportunity)	FE	3					CAUTION: Does not include criminal history checks. SEE Agency Item Number 1E.008. Previously 3B.007 CONFIDENTIAL RECORD	29 CFR §1602.31
1E.020	3.2.005	W-4 Forms: Federal Tax Records	Employer's copy of Employee's Withholding Exemption Certificate.	AC	4			AC = After the due date of tax for the return period to which the records relate, or the date such tax is paid, whichever is the later.		CONFIDENTIAL AND VITAL RECORD	26 CFR §31.6001-1 (e) (2)



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					Years	Months	Days					
1E.023	3.1.018	Grievance Records	Records relating to the review of employee grievances against personnel policies, working conditions, etc.	AC	5			AC = Final decision on the grievance.		CAUTION: Does not include formal complaints filed by an agency employee with the Equal Employment Opportunity (EEO) of the U. S. Department of Labor. SEE Agency Item Number GEN.019. Previously 8.051 VITAL RECORD		
1E.026	3.1.023	Job Descriptions and Task Statement	Job descriptions, including all associated task or skill statements, for positions in an agency.	AC	4			AC = Until job eliminated or revised.		VITAL RECORD	Administrative Code, Title 40, Part 20, Chapter 815, Subchapter C, Rule §815.106, (i)	
1E.027	3.3.015	Job Analysis Files	Records relating to review and monitoring of job classifications within an agency.	US	3					Previously 5A.028b		
1E.030	3.4.002	Leave Status Reports (Documents)	Cumulative report is issued each pay cycle and provides employee leave status information for each position.	FE	3					VITAL RECORD		



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1E.033	3.1.022	Personnel Action Request Form (Blue Sheet)	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. Also includes resignation forms and notifications of employment.	AC	5			AC = Termination of employment.			29 CFR §1602.31
1E.034	3.1.019	Employee Performance Appraisals		FE	2					Previously 5A.023, 8.052 VITAL RECORD	29 CFR §1620.32 (C)
1E.035	3.3.011	Former Employee Verification Records	Minimum information needed to verify employment, including name, social security number, exact dates of employment, last known address, and most recent public access option form (change request).	AC	75			AC = Termination of employment.		SEE ALSO Agency Item Number 1E.056. CONFIDENTIAL AND VITAL RECORD	
1E.041	3.4.008	Sick Leave Pool Documentation	Requests submitted, approvals, number of hours transferred in and out, etc.	FE	3					CONFIDENTIAL RECORD	





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1E.042	3.3.026	Agency Staffing Reports	Any reports compiled by an agency on aspects of personnel staffing, including Full-time Employee (FTE) and turnover reports, vacant position lists, staffing charts, organization charts, as well as 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.	US	3					Previously 5A.049	



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1E.046	3.4.006	Time Sheets	Includes Grant Funded employee timesheets, semi-annual certification form, personnel activity reports, and any other supporting documentation needed to show the authorization of hours worked by staff that are paid solely or partially by grant funds, or personnel being used to match. Also includes leave requests (Part B) that are required by policy to be submitted to the Human Resources (HR) office and all Family and Medical Leave Act (FMLA) documentation.	AC	4			AC = The date of submission of the last expenditure report for the final year of each 5-year plan.		CONFIDENTIAL RECORD	2 CFR §200.333 Administrative Code, Title 40, Part 20, Chapter 815, Subchapter C, Rule §815.106 (i)	
1E.048	3.1.027	Employee Training Achievement Records	Certificates of completion, transcripts, test scores, or similar records documenting the training, testing, or continuing education achievements of an employee.	AC	5			AC = Termination of employment.				
1E.050	3.2.007	Unemployment Compensation Records	Includes information requested from Texas Workforce Commission (TWC) determining eligibility for unemployment benefits. In personnel folder.	AC	5			AC = Request for unemployment compensation.				



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1E.051	3.1.029	Verification of Citizenship - INS I-9	Federal reporting form (INS I-9).	AC				AC = three years after the date of the hire or one year after the date the individual's employment is terminated, whichever is later.		CAUTION: Federal regulation requires that INS 1-9 forms be retained for 3 years from date of hire or 1 year after separation of the employee, whichever 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. CONFIDENTIAL AND VITAL RECORD	8 CFR §274a.2 (b) (2) (i) (A) 8 CFR §274a.2 (c) (2)
1E.053a	3.1	Employee Acknowledgement Forms	Acknowledgement forms for receipt of employee guide, IRT security policy, retention and recruitment plans, etc.	AC	2			AC = Until superseded or termination of employment		VITAL RECORD	29 CFR §1602.31
1E.054	3.1.011	Employee Insurance Records	Agency copies of information relating to the selection by employees of life, disability, health, and other types of insurance offered by the State of Texas to its employees.	AC				AC = Until superseded or termination of employment.		CAUTION: Documents that serve as payroll deduction authorizations must be maintained for the retention period prescribed for Agency Item Number 1E.057. CONFIDENTIAL RECORD	



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1E.055	3.1.037	Employee Recognition Records	Awards, incentives, tenure, etc.	AC	5			AC = Termination of employment.		SEE ALSO Agency Item Number 8.053 for Employee of the Quarter (EOQ) Records	
1E.056	3.1.038	Public Access Option Form	Change Request Form completed and signed by employee or official, or former employee or official, electing to keep home address, home telephone number, social security number, and family information open or confidential under the Public Information Act, Government Code §552.024.	US						SEE Agency Item Number 1E.035. VITAL RECORD	
1E.057	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			AC = After termination of employee or after amendment, expiration, or termination of authorization, whichever sooner.		CONFIDENTIAL RECORD	
1E.059	3.2.004	Income Adjustment Authorizations	Used to make increases or decreases to employees' gross pay, Federal Insurance Contributions Act (FICA), retirement, or in the computation of taxes.	FE	2						29 CFR §516.6 (a)



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1E.060	3.2.009	State Deferred Compensation Records		AC	5			AC = All accounts with a vendor or vendors for the individual participant have been closed.		For 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 (ERS).	
1E.062	3.3.001	Retention and Recruitment Plan	Affirmative action plans for both regular employees and apprenticeship programs.	FE	5						29 CFR §30.8 (a) for apprenticeship plans.



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1E.063	4.7	USAS/USPS/SPA/TINS: Security Access	Documents Confidential Tax/Vendor Information Agreement (CTIA) forms that are signed by all employees who are given access to one or more of the computer systems administered by the Comptroller of Public Accounts (CPA), including Uniform Statewide Accounting System (USAS), Uniform Statewide Payroll System (USPS), State Property Accounting (SPA), and Texas Identification Number System (TINS).	AC	5			AC = Until superseded or termination of employment.			
1E.064	1.1.048	Formal EEO Complaints	Includes complaint, legal and investigative documents, exhibits, related correspondence, and decisions or judgments. (EEO = Equal Employment Opportunity)	AC	5			AC = Final decision of complaint. R	R	ARCHIVES NOTE: 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.	
1E.065	5.6.009	Parking Permits and Authorizations		AC	2			AC = Until superseded or termination of employee.			



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1E.066	5.4.012	Security Access Records	Records relating to the issuance and approval for identification badges, electronic access cards, building passes, or similar instruments of access to agency or state facilities, equipment, or automated systems.	AC	2			AC = Until superseded, date of expiration, or date of termination, whichever is sooner.		Previously 8.072	
1E.067	3.3	Veterans Report	This report compiles and analyzes information about the hiring and employment of veterans, and identifies whether an employee is eligible for veteran's preference.	US							Texas Government Code, §657.008
1E.068	1.1	Release of Records Documents	Records that document the release of records or information through any method other than a Public Information Act request or subpoena (including general employment verification requests).	AC	5			AC = Date of transmittal of information requested.		For employment verification requests from Texas Workforce Commission, see Agency Item Number 1E.050.	
1E.069	3.1.013	Employment Contracts		AC	7			AC = Expiration or termination of the contract according to its terms.			Government Code, §441.1855



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1E.070	3.1.035	Performance Bonds	Bonds posted by employees and individuals or entities under contract with an agency for the performance of the duties of a position or the terms of a contract with the agency.	AC	7			AC = Expiration or termination of the contract according to its terms.		CAUTION: Does not include construction or architectural surety bonds. SEE item number 8.075.  SEE related item GEN.059 Contracts and Leases.	Government Code, §441.1855	
1F.001	5.4.012	Inventory of Building Keys Issued	Inventory listing and records relating to the issuance and return of keys to agency or state facilities, equipment, or automated systems.	AC	2			AC = Until superseded, date of expiration, or date of termination, whichever sooner.				
1F.002	5.6.005	Vehicle Use Reports	Includes mileage, fuel/oil consumption, passengers carried, and other related operational information.	FE	3							
1F.003	5.1.005	Postage Records	Records and reports of postage expenses, including postal meter usage.	FE	3							
1F.005	5.1.007	Reproduction Service Records	Includes word processing and data processing.	AV								
1F.008	5.6.003	Vehicle Inspection, Repair, and Maintenance Records		LA	1							
1F.012	5.2.014	Annual Property Inventory Verifications	Property, equipment, and supply verifications.	FE	3							





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1F.013	5.2.016	Inventory Monthly Updates	Listing shows all additions, changes, deletions, and transfer times for the monthly processing period.	AC				AC = Transfer of information into annual listing.				
1F.014	5.2.017	Lost & Stolen Property Reports		FE	3							
1F.015	5.2.009	Personal Property Inventory Reconciliation with SPA	Updates agency portion of the inventory listing and adds, changes, transfers, or deletes items from inventory. (SPA = State Property Accounting)	FE	3							
1F.016	5.2.021	Surplus Property Sale Records		FE	3							
1F.017	4.7.004	Real Property Inventory Reconciliation		LA	3							
1F.018	4.7.004	Capital Asset Records		LA	3							
1F.020	5.2.009	Equipment Inventory Detail Report	Updates agency portion of the inventory listing and adds, changes, transfers, or deletes items from inventory.	FE	3							
1F.021	5.2.019	TFC Portal Requests	Work order submitted to Texas Facilities Commission (TFC) for any mechanical service, installation, or repair.	FE	1					SEE Agency Item Numbers 5B.005 and 6.045 for other similar record series that have varying retention requirements.		
1F.022	5.2.020	Annual Consumable Inventory		FE	1							



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A/I – Transfer to State/University Archivist  
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					Years	Months	Days				
1F.023	3.3.020	Custodial Work and Cleaning Schedule	Custodial staff cleaning schedule and list of duties and appropriate access times to complete tasks.	US	1						
1G.002	5.3.008	Purchasing Logs	Log, register, database, spreadsheet, etc., that provides a record of purchase orders issued, orders received, and similar data on procurement status.	FE	3						
1G.016	4.2.005	Purchase Requisitions, Purchase Orders - Federal and Non-Federal	Requisitions, orders, receiving reports, invoices, statements, change orders, best value determinations, etc.	AC	7			AC = The date the contract is completed or expires.		Non-grant records will be destroyed at the same time as grant records. Check with ARIS, TBP, and LDN before destruction to ensure all records necessary to fulfill federal requirements are included in the corresponding grantee files. Texas Identification Numbers (TINS) are CONFIDENTIAL RECORDS.	Government Code, §441.1855
1G.017	5.3.007	Bid Documentation	Includes bid requisition / authorizations, invitations to bid or propose, bid specifications, successful and unsuccessful bids, and bid tabulation / evaluations.	AC	7			AC = Expiration or termination of the instrument according to its terms or decision not to proceed with the bid.			Government Code, §441.1855



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2.005	2.2.010	Data Processing Policies and Procedures	Manuals, guidelines, or similar documents establishing data processing policies and procedures in an agency in such areas as access and security, systems development, data retention and disposition, data ownership, production control, system back-up, etc., including IRT Security Policies.	US	3					CAUTION: Does not include technical documentation of procedures necessary for reading or processing of electronic records. SEE Agency Item Number GEN.042. VITAL RECORD	
2.020	2.2.016	Software Registrations, Warranties, and License Agreements		LA	3						
2.022	1.1.055	Information Resources Strategic Plan (IRSP)	Information resources and operational strategic plans prepared in accordance with 2054.095 and 2056.002, Government Code.	AC	6			AC = September 1 of odd-numbered calendar years.	A	SEE ALSO Agency Item Number 8.041. ARCHIVES NOTE: The archival requirement is met by sending the required copies of the plans to the Texas State Publications Depository Program, TSLAC. VITAL RECORD	



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2.027	1.1.067	Reports - Department of Information Resources (DIR) and Legislative Budget Board (LBB)	Non-fiscal special reports other than Strategic Plan.	FE	5				R	ARCHIVES NOTE: For agencies that have had an archival appraisal, separate this records series by each type of archival coding, A, R, or E. SEE page ix of the 4th Edition of the Texas State Records Retention Schedule (RRS) for more information.	
2.042	1.1.004	Legislative Appropriation Requests (LAR)	Including any supporting documentation created and/or used to justify and support legislative appropriations requests by an agency. Also includes Biennial Operating Plan (BOP) and Information Technology Detail (ITD).	AC	6			AC = September 1 of odd-numbered calendar years.	A	SEE ALSO Agency Item Number 8.005. ARCHIVES NOTE: The archival requirement is met by sending the required copies of the requests to the Texas State Publications Depository Program, TSLAC. Only copies of supporting documentation submitted to the Legislative Budget Board (LBB) are archival. VITAL RECORD	
2.048	5.1	Service Requests	Helpdesk requests and telephone service requests used for information as a knowledge base to support agency users.	AV							



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2.049	2.1.001	Processing Files	Machine-readable files used in the creation, utilization, and updating of master file including Structured Query Language (SQL) scripts that create and alter databases.	AC				AC = When all requirements for records being created from the correlating program database have been satisfied or completed, or 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: Records management officers must be certain before assigning the retention period of AC to agency automated processing files that the files do not fall under records series listed elsewhere.	
2.050	2.2.004	Computer Job Schedules and Reports	Schedules or similar records showing computer jobs to be run and other reports by computer operators or programmers of work performed.	AC	3			AC = When all requirements for records being created from the correlating program database have been satisfied or completed.			



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2.051	2.1.010	Audit Trail Records	Files needed for electronic data audits such as files or reports showing transactions accepted, rejected, suspended, and/or processed; history files/tapes; records of online updates to application files or security logs.	AC				AC = All audit requirements have been met.			
2.052	2.2.012	Output Records for Computer Production	Reports showing transactions that were accepted, rejected, suspended, and/or processed.	AV						VITAL RECORD	
2.053	2.2.013	Quality Assurance Records	Information verifying the quality of system, hardware, or software operations including records of errors or failures and the loss of data resulting from such failures, documentation of abnormal termination and of error free processing, checks of changes put into production, transaction histories, and other records needed as an audit trail to evaluate data accuracy.	AC				AC = No longer needed as an audit trail for any records modified.			



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2.054	2.1.002	Master Files	Relatively long-lived computer files containing organized and consistent sets of complete and accurate electronic records. Examples include, but are not limited to, data tables of relational databases used by applications or computer programs.	AC				AC = Completion of 3rd verification cycle, or audit completion confirming successful transaction updates, or required audit trail maintenance, or the ability to restore or migrate when errors are detected or when hardware or software changes occur.		CAUTION: Records management officers must be certain before assigning the retention period of AC to agency automated processing files that the files do not fall under records series listed elsewhere.	
3A.001	1.1	Archival Holdings Legal Documentation	Includes accession logs, deeds of gift, loan documentation, replevin files, legislators' Texas Govt. Code Section 306 and 323 forms, and record copies of memorandums of understanding.	PM						VITAL RECORD	
3A.001a	1.1	Permanent Archival Holdings Documentation	Includes accession files, appraisal files, location information, shelf lists, inventories, Capitol Art files, flag files, and conservation/preservation evaluations and condition reports.	PM							



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3A.001b	1.1	Archival Holdings Documentation - Working Files	Includes preservation surveys, finding aids, finding aid processing files, processor and appraiser notes, digitization management documentation, conservation/preservation treatment files, and copies of Request for Authority to Dispose of State Records (RMD 102)	AV						CAUTION: Original RMD 102 is retained by the SLRM Division of TSLAC, SEE Agency Item Numbers 5C.012, 5E.003, and 5E.004. SEE ALSO 1D.008 for Agency Copy of RMD 102.	
3A.002	1.1	Patron Registrations and Archival Materials Usage Reports	Patron Registrations: registration and agreement cards signed by patrons registering to use the library services and archival collections. Archival Material Usage Reports: information related to materials requested, pulled, and used by patrons. Includes record group series and dates of requests.	PM						CONFIDENTIAL RECORD	





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3A.023	4.7.008	Federal Grants - Grant Files	Includes TSLAC grant programs funded by the Institute of Museum and Library Services (IMLS), National Archives and Records Administration (NARA), National Historical Publications and Records Commission (NHPRC), and other federal funding sources, including applications processed through the Texas Historical Records Advisory Board (THRAB), required supporting documents, award, contract, correspondence, payment documents, required reports, Financial Status Reports (FSR), and other financial documents.	AC 3				AC = The date of submission of the last expenditure report for the final year of each 5-year plan.		CAUTION: Retention requirements may vary depending on the specific federal funding agency. Agencies must ensure that records are retained for the appropriate retention period. Also, be sure to check with ADMIN before destruction to ensure all records necessary to fulfill federal requirements have been transferred to appropriate corresponding grantee files. SEE Agency Item Number 1B.087. VITAL RECORD	2 CFR §200.333
3A.025	5.1.007	Photocopy Service Requisitions	Includes word processing and data processing.	AC	2			AC = Completed request has been mailed to or received by patron.			



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3A.026	1.1.070	Procedures Manuals for the Treatment of Agency Holdings	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.	PM					A	VITAL RECORD	
3A.027	1.1	Donor Lead Files	Correspondence and other documentation with potential transfers or donations of historical materials.	FE	5				R	ARCHIVES NOTE: Correspondence, notes, etc., with donors who transfer manuscript collections to the ARIS Division of TSLAC will be added to the manuscript accession files. SEE Agency Item Number 3A.001a. VITAL RECORD	
3A.028	1.1	Outreach Projects	Historical documentation of exhibits, publications, events, loans, histories of holding treatments, etc.	PM						SEE Agency Item Number 3A.062.	
3A.034	4.7.004	Capital Asset Records - Sam Houston Center	Copies of deeds, agreements with donors, and property maintenance reports.	LA	3						



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3A.058	1.1	Permissions History	Image permission forms and correspondence requesting permission to publish images from archival collections.	AV							
3A.060	1.1	Photo Reproduction Orders	Memos and check in/out sheets to vendors since 1977. Includes information or image numbers, description, and work performed.	AV							
3A.062	1.1	Online Exhibits	Digital image files.	AC	3			AC = Exhibit no longer available online.			
3A.065	4.4.002	Accounts Receivable Ledgers - Photocopies	Payments due for photocopies.	FE	3						
3A.069	5.5.003	Station Activity Reports	Internal listing of incoming/outgoing telephone activity to individual telephone stations.	AV							
3A.074	1.1	Conservation/Preservation Database	Contains final data from conservation/preservation treatment files.	PM							
3A.075	5.3	Conservation Equipment and Supply	Research, Pricing, and Documentation Research and other preliminary documentation needed for the procurement of grant funded goods and services for the Conservation Lab.	AC				AC = Date of direct purchase, decision not to proceed with purchase, or until no longer administratively valuable, as applicable.			



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3B.002	1.1	Regional Historical Resource Depository (RHRD) - Permanent Archival Holding Files	Accession records, donor files, agreement records, and collection history records.	PM						VITAL RECORD	
3B.006	1.1	Microfilm Loan Requests	Loan requests from Interlibrary Loan (ILL) and Regional Historical Resource Depository (RHRD).	FE	1					CAUTION: Do not confuse this record series with Interlibrary Loan (ILL) Service Files - 3B.009.	
3B.008	1.1	Regional Historical Resource Depository (RHRD) Microfilm Projects	RHRD microfilm holdings include packing lists, camera operator reports, inventories, finding guides, and correspondence with Genealogical Society of Utah and RHRDs.	PM							
3C.004	1.1	Duplicate Exchange/Disposal List	Materials withdrawn by federal depository libraries in Texas.	FE	3						
3C.006	1.1	U.S. Government Printing Office - Federal	Depository Library Program (FDLP) FDLP plans, inspections, lost/missing documents list, finding aids, and Bernan/Folland/Marcive shipping list database.	AV					R		



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3C.047	2.1	Texas State Data Center Records	The Texas State Data Center and Office of the State Demographer, in cooperation with a network of affiliates, functions as a focal point for the distribution of Census information from the federal government, state government, and other sources. TSLAC is a Coordinating Agency for the program. Records include correspondence, agreements, surveys, and list of reference works.	AC	4			AC = Until TSLAC withdraws from the program.			
3C.050	1.2	Archives Retrieval and Return Log	Information for off-site storage requests of archival material and when materials were returned for off-site storage. Includes dates and box numbers of when the materials were requested and returned to off-site storage.	AC		6		AC = Until all actions have been completed.			



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3C.051	5.4	ARIS Surveillance Video	Video surveillance of the public service areas.	US		90				SEE Agency Item Number 5E.026 for the State Records Center (SRC) surveillance videos. CAUTION: Surveillance video is automatically overwritten every 90 days at an offsite location. The disposal of this video information need not be documented through destruction signoffs (GEN.034/3A.072) or in records disposition logs (3A.046). If surveillance video is needed as a part of an investigation, maintain recordings in accordance with corresponding record series applicable to incident or investigation.	



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3C.053	4.7	Donation of Library Materials and Monetary Contributions Records	Donation forms filled out and submitted by individuals or groups donating monetary contributions and published materials to the ownership of the Texas State Library and Archives Commission (TSLAC). Includes donation form, all correspondence, thank you letters, copies of checks and monetary donation information, and any other pertinent information regarding donation.	FE	7					CAUTION: Do not confuse this series with records that document the donation and accession of archival, historical materials, or permanent endowments. SEE Agency Item Numbers 3A.001a, 3A.027, and 3B.002.	
3C.054	1.1	Texas State Publications Depository Program Publications List Form	Publications List Form, any variation of this form, or any correspondence that accompanies a Texas State Publications Depository Program publication submission.	FE	1						



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3C.055	1.1	Interlibrary Loan (ILL) Service Files	Non-administrative incoming/outgoing and internal correspondence and request forms, in any media, pertaining to or arising from the routine operations of the ILL services offered by the Information Services division of TSLAC, including monthly ILL statistics, reports, invoices sent and received, and other supporting documents.	AC	3			AC = After submission of the last expenditure report for the final year of each LSTA 5-year plan.		Check with LDN before destruction to ensure all records necessary to fulfill federal requirements are included in the corresponding grantee files. SEE Agency Item Number 3A.023, 4.055, 4.056, or 4.057.  CAUTION: Do not confuse this record series with Microfilm Loan Requests AIN #3B.006.	2 CFR §200.333
3D.001	1.1	Collection History Documentation	Documents that describe or clarify history or significant changes in library collection areas including but not limited to the U.S. Documents, Texas Documents, and Dewey collections. Includes genealogy, reference, and archives brochures, newspaper clippings, memos, letters, discussions on the changes to hours of operation.	AC				AC = After collection has been disbanded.			





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3E.003	1.1	SirsiDynix Project Files	Includes copies of requests for binding from the Divisions and the binding slips sent to HFGGroup with the books, and packing slips showing what was returned	AC	7			AC = Until contract terminated, completed, or expired.			
3E.024	1.1.065	Collection Statistics - Reports and Studies (Non-Fiscal) - Raw Data	Information or data collected and compiled for the purpose of producing non-fiscal reports. Spreadsheet used to report historical collection statistics.	FE	3					CAUTION: Does not include source documentation used for information or data included in or directly related to another records series in this schedule. SEE especially Agency Item Number GEN.027. Also, do not confuse this record series with other non-fiscal reports and studies that have shorter retention requirements, SEE Agency Item Number GEN.029.	
3E.034	1.1	TSLAC Bindery Records	Includes all correspondence and documentation of software upgrades, contract renewals, client care cases opened and completed, and history of our partner library participation	AC		2		AC = Until bound items have been returned from bindery and it is determined that work was satisfactorily performed.			



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4.006	1.1	LDN Workshop Participant Attendance Records	Sign-in sheets or other documents recording the presence of participants. Used for certifications and Continuing Education Units (CEU).	AC	3			AC = The date of submission of the last expenditure report for the final year of each 5-year plan.		CAUTION: Do not confuse this record series with RMA Training Program Records. SEE ALSO Agency Item Number 5C.201. VITAL RECORD	2 CFR §200.333
4.008	1.1	Library System Membership Applications	Paper application form signed by library officials seeking Library System membership.	FE	5						
4.010	1.1	Library Establishment and Legal Documentation	Documents that show the legal establishment of libraries.	PM						VITAL RECORD	
4.042	1.1	LDN Special Project Files	Projects of temporary duration specific to LDN. May include research studies, onetime grants, distribution of settlement materials, etc.	AC	5			AC = Submission of final report, final grant documentation, or other project deadline.		Previously 9.004	
4.043	1.1.065	Public Library Annual Report Data	Spreadsheets and/or databases of summary statistical data of annual quantitative performance also used for historical reports.	PM						CAUTION: Does not include source documentation used for information or data included in or directly related to another records series in this schedule. SEE especially Agency Item Number GEN.027. VITAL RECORD	



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Retention Codes (field 7)

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Archival Codes (Field 10)

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 R/O – Review by State/University Archivist

1. Agency Code:		2. Agency Name:									
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				
4.043a	1.1.007	Public Library Annual Report Documentation	Incoming/outgoing correspondence to/from entities seeking changes in their Public Library Annual Report documentation.	PM					R		
4.044	4.7.008	Grants: Federal Grants - Library Services and Construction Act (LSCA) - Grantee Project Files - Construction Grants	Contains all records for construction grants issued under the LSCA Title II Program, including tracking spreadsheets.	AC	20			AC = After submission of the last expenditure report for the final year of the grant.		VITAL RECORD	



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					Years	Months	Days				
4.050	4.7.008	Grants: State Funded Grant Programs Documentation	Including Texas Reads. Contains application (budgets and plans of service), other financial records, supporting documents, awards, amendments, statistical records, correspondence, requests for funds, reports, and performance reports.	AC	3			AC = Satisfaction of all Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments (the Common Rule).		CAUTION: Retention requirements may vary depending on the specific funding agency. Agencies must ensure that records are retained for the appropriate retention period. CAUTION: If Texas Reads grant is paid through federal monies, SEE Agency Item Number 4.055. Also, be sure to check with ADMIN before destruction to ensure all records necessary to fulfill federal requirements have been transferred to LDN and are included in the corresponding grantee files. SEE Agency Item Number 1B.088. Previously 9.065a VITAL RECORD	



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					Years	Months	Days				
4.052	4.7	E-Rate Documentation	All documentation relating to the Schools and Libraries Program of the Universal Service Fund, which is administered by the Universal Service Administrative Company (USAC) under the direction of the Federal Communications Commission (FCC).	AC	10			AC = After the latter of the last day of the applicable funding year or the service delivery deadline for the funding request.		Federal Communication Commission (FCC 04 -190) VITAL RECORD	47 CFR §54.516



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					Years	Months	Days				
4.055	4.7.008	Grants: Federal Grants - Institute of Museum and Library Services (IMLS) - LSTA Grantee Project Files	Including all IMLS funded Library Services and Technology Act (LSTA), Technical Assistance Negotiated Grant (TANG), Interlibrary Loan (ILL), Library Systems, Federal Texas Reads, or any other federal (non-construction) competitive grant program or cooperation, special projects, and establishment programs. Contains application, required supporting documents, award, financial records, statistical records, correspondence, requests for funds, all required reports submitted by grantee, ILL Centers Consultations (site visit notes and correspondence related to TexNet Program), Financial Status Reports (FSR), and all other related documentation.	AC 3				AC = The date of submission of the last expenditure report for the final year of each 5-year plan.		CAUTION: If Texas Reads grant is paid through state monies, SEE Agency Item Number 4.050. Other retention requirements may vary depending on the specific federal funding agency. Agencies must ensure that records are retained for the appropriate retention period. Also, be sure to check with ADMIN before destruction to ensure all records necessary to fulfill federal requirements have been transferred to LDN and are included in the corresponding grantee files. SEE Agency Item Number 1B.085. Previously 4.046, 4.047, 4.048, 4.049, 9.001 VITAL RECORD	2 CFR §200.333



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					Years	Months	Days				
4.055a	4.7.008	Grants: Federal Grants - Institute of Museum and Library Services (IMLS) - Interlibrary Loan (ILL) Requests and Statistics	Including all turnaround time statistics and monthly ILL statistics for TexNet Centers that are subject to Library Services and Technology Act (LSTA) records retention requirements.	AC	3			AC = The date of submission of the last expenditure report for the final year of each 5-year plan.		CAUTION: As of Fiscal Year 2010, these records are no longer maintained in a paper format and are no longer stored at the State Records Center (SRC). Once all of the paper records held at the SRC have been destroyed, the assigned storage number can be voided. Previously 9.002 VITAL RECORD	2 CFR §200.333



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					Years	Months	Days				
4.056	4.7.008	Grants: Federal Grants - Institute of Museum and Library Services (IMLS) - Non-LSTA Grantee Project Files	Including all Non-Library Services and Technology Act (LSTA) IMLS funded grants, or any other federal (nonconstruction) competitive grant program or cooperation, special projects, and establishment programs. Contains application, required supporting documents, award, financial records, statistical records, correspondence, requests for funds, all required reports submitted by grantee, Financial Status Reports (FSR), and all other related documentation.	AC	3			AC = The date of submission of the last expenditure report for the final year of each 5-year plan.		CAUTION: If Texas Reads grant is paid through state monies, SEE Agency Item Number 4.050. Other retention requirements may vary depending on the specific federal funding agency. Agencies must ensure that records are retained for the appropriate retention period. Also, be sure to check with ADMIN before destruction to ensure all records necessary to fulfill federal requirements have been transferred to appropriate corresponding grantee files. SEE Agency Item Number 1B.086 and 1B.087. Previously 9.065 VITAL RECORD	2 CFR §200.333





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					Years	Months	Days				
4.058	4.7	Grants: Private Foundation and Other Alternatively Funded Grant Sources - Grantee Project Files	Non-federal and non-state funded grants. Includes application, required supporting documents, award, financial records, statistical records, correspondence, requests for funds, all required reports submitted by grantee, and all other related grant documentation.	AC	3			AC = Satisfaction of all Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments (the Common Rule).		CAUTION: Retention requirements may vary depending on the specific funding agency. Agencies must ensure that records are retained for the appropriate retention period. CAUTION: Retention requirements may vary depending on the specific federal funding agency. Agencies must ensure that records are retained for the appropriate retention period. Also, be sure to check with ADMIN before destruction to ensure all records necessary to fulfill federal requirements have been transferred to LDN and are included in the corresponding grantee files. SEE Agency Item Number 1B.084. Previously 9.071 VITAL RECORD	



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					Years	Months	Days				
4.060	4.2.005	Program Invoicing Worksheets	Includes billing detail, contracts and invoices for invoicing services (convenience copy), correspondence, fee calculation spreadsheets and supporting documents, etc. for TexShare, TexQuest, and other programs.	FE	3					Previously 9.068 VITAL RECORD	
4.061	1.1	Program History Files	Includes manuals, guidelines, correspondence, reports, contracts (convenience copies), licenses, membership and participation agreements, fee schedules, and other materials distributed internally or externally that are needed to document and ensure continuity of programs and the rights and obligations of program stakeholders. Also includes rosters, minutes and background materials for program advisory boards, committees, working groups, task forces, etc.	AC	3			AC = Completion, termination, or discontinuance of the program.	R	Previously 9.070 VITAL RECORD	



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					Years	Months	Days				
4.062	5.1.004	Texas Libraries Directory Database	A database that lists contact information for Libraries in Texas.	AC				AC = When updated, revised, or no longer needed.		CAUTION: The disposal of regularly updated information in this database need not be documented through destruction signoffs (GEN.034/3A.072) or in records disposition logs (3A.046). However, if the database ever becomes obsolete, the final destruction of the database will need to be documented.	
5.006	1.1.064	Consulting Logs	A consolidated log of all consulting logs that is used for performance measure reporting.	AC	3			AC = The date of submission of the last expenditure report for the final year of each 5-year plan.		CAUTION: The AC + 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. SEE Agency Item Number 5C.013 for individual RMA Consulting Files. VITAL RECORD	2 CFR §200.333



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					Years	Months	Days				
5.009	4.2	Customer Orders	Orders from customers requesting services from SLRM such as microform copies of documents. Includes census, Supreme Court dockets, Texas Documents, Docket Subscribers, etc.	FE	3					NOTE: Delete this records series after disposition of records on hand after FY2021 starts. SRC no longer accepts any orders from individuals. Those orders flow through ARIS as of 1/1/2017.	
5.024	4.5.001	Budget Work Papers, Estimates, and Requests	Unit working papers created for the preparation of budgets, including estimates and requests	FE	6					CAUTION: Do not confuse this record series with Agency Item Number GEN.055. VITAL RECORD 90-306-002	
5.028	3.3.020	SLRM Work Schedules/Assignments	Work, duty, shift, crew, or case schedules, rosters, or assignments.	FE	1						
5.201	1.1	State and Teacher Employment Verifications	Reference files including index and verification log needed as reference for employment verification lookup.	PM						94-306-083	
5A.001	5.4.011	SLRM Visitor Registers and Logs	Logs, registers, or similar records documenting visitors to limited access or restricted areas of agency facilities including the State Records Center (SRC).	FE	3					SEE Agency Item Number 8.076 for Welcome Desk visitor registers and logs. 95-306-093	



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					Years	Months	Days				
5A.016	2.1.002	State Agency Codes Master Files	Relatively long-lived computer files containing organized and consistent sets of complete and accurate electronic records. Examples include, but are not limited to, data tables of relational databases used by applications or computer programs.	AC				AC = Completion of 3rd verification cycle, or audit completion confirming successful transaction updates, or required audit trail maintenance, or the ability to restore or migrate when errors are detected or when hardware or software changes occur.		CAUTION: Records management officers must be certain before assigning the retention period of AC to agency automated processing files that the files do not fall under records series listed elsewhere. VITAL RECORD	
5A.031	4.1.002	Work Papers - Billing Statements	Includes supporting documentation for billing, public microfilm orders, etc.	FE	3					Note: SLRM has some supporting documentation. Final billing and contracts kept in agency Accounting department. VITAL RECORD 91-306-008	
5B.005	5.2.019	Service Orders	Agency copy of forms completed by mechanical service personnel for installation or repair and Texas Facilities Commission (TFC) Portal Requests for building maintenance or other services. Includes billing code, service, labor, parts, and remarks.	FE	2					SEE Agency Item Numbers 1F.021 and 6.045 for other similar record series that have varying retention requirements.	



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					Years	Months	Days				
5B.011	5.6.003	Vehicle Inspection, Repair, and Maintenance Records		LA	1						
5B.012	5.4.008	Hazard Communication Plans		US	5					VITAL RECORD	Health and Safety Code, §502.009 (g)
5B.013	5.4.009	Workplace Chemical Lists		FE	30						Health and Safety Code, §502.005 (d)
5B.018	5.6.005	Vehicle Use Reports	Includes mileage, fuel/oil consumption, passengers carried and other related operational information.	FE	3						
5B.019	5.4.010	Material Safety Data Sheets		AC				AC = After sheets are updated or hazardous chemical no longer stored by agency, as applicable.			
5C.001	1.1	State Agency Retention Schedules Database (STARS)	Retention schedule tracking database.	AC				AC = Approval of subsequent recertification.		VITAL RECORD	



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5C.003	5.1.004	State Agency Records Management Officer (RMO) List	List of the state agency head and position title, designated RMO name and position title, state agency name and code, address, phone and fax number, email address, and any other contact information.	US	2					Note: Monthly report is no longer generated. After all records are dispositioned, consider removing item from retention schedule through amendment or next recertification.	
5C.004	5.1.004	State Agency Records Management Officer (RMO) List Database	Database listing of state agency heads and position titles, RMO name and position title, state agency name and code, analyst assigned to agency, address, phone, and fax number, email address, and any other contact information.	US						CAUTION: The disposal of the regularly updated information in this database need not be documented through destruction signoffs (GEN.034/3A.072) or in records disposition logs (3A.046). However, if the database ever becomes obsolete, the final destruction of the database will need to be documented.	
5C.007	1.1	State Agency Schedule Recertification Log	Listing that shows the dates and deadlines of state agency retention schedule recertifications.	US						VITAL RECORD	
5C.008	1.1	State Agency Records Management Officer (RMO) Appointments	Letter of appointment from state agency head or Form SLR 104.	US	3						



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5C.010	1.1	State Agency Retention Schedules -Working Copies	Working copies of retention schedule certification or amendment submissions.	AV						CAUTION: Be careful not to dispose of documents listed under Agency Item Numbers 5C.014 or 5C.501 when disposing state agency retention schedule working copies. SEE Agency Item Numbers 5C.014 and 5C.501 for retention instructions for these documents.	
5C.011	1.1	State Agency Approved Retention Schedule File (R04 File - Superseded Schedules)	Includes the superseded retention schedule (Form SLR 105), any amendments (Form SLR 122), and any signature approval pages (Form SLR 105C), State Agency Retention Schedule and Amendments (STARS) checklist (Form SLR-123a) from 5C.501, and all administrative correspondence to the state agency.	AC	50			AC= FY superseded or agency abolished, whichever occurs first.	R	This is the State's Record Copy of the agency's superseded retention schedule(s) including any amendments with TSLAC acting as the state's agent. See 1D.001 for the agency's record copy. Follow RMA procedures on what to include in this file from the R01 and R02 files. 12-306-216 VITAL RECORD	





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					Years	Months	Days				
5C.012	1.1	State Agency Requests for Authority to Dispose of State Records (Form RMD 102)	Requests from state agencies to SLRM to destroy records series that are not listed on their approved retention schedule.	FE	20					CAUTION: Do not confuse this record series with other agency destruction requests. SEE Agency Item Numbers 1D.008, 5C.103, 5E.003, and 5E.004. VITAL RECORD	
5C.013	1.1	Consulting Files	Correspondence, compliance status reports, and notes documenting individual consulting provided to state agencies and local governments, including individual consulting logs.	FE	2					SEE Agency Item Number 5.006 for consolidated consulting log created from this record series.	



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					Years	Months	Days				
5C.014	1.1	State Agency Retention Schedule Certification and Amendment Files (R01 File - Current Schedule)	Includes the current approved retention schedule (Form SLR 105), any amendments (Form SLR 122), any signature approval pages (Form SLR 105C), and all administrative correspondence to the state agency.	AC				AC = Until schedule is superseded by next approved recertification, then re-number file as R04 and transfer file to Agency Item Number 5C.011 for further retention.		This is the State's Record Copy of the agency's current retention schedule including any amendments with TSLAC acting as the state's agent. See 1D.001 for the agency's record copy. CAUTION: Do not confuse these documents with other records involved with state agency retention schedule reviews listed under Agency Item Number 5C.501. Previously 5C.006a, 5C.006b	
5C.101	1.1	Local Government Compliance Database	Includes RMO-G for non-elected officials and RMO-C for elected officials.	US						CAUTION: The disposal of the regularly updated information in this database need not be documented through destruction signoffs (GEN.034/3A.072) or in records disposition logs (3A.046). However, if the database ever becomes obsolete, the final destruction of the database will need to be documented.	



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					Years	Months	Days				
5C.102	1.1	Local Government Compliance Records	Includes Forms SLR 500, SLR 504, SLR 507, SLR 508, SLR 509, SLR 520, SLR 540, or equivalent records control schedule, Electronic Records Certification, all records management ordinances/policies, and any administrative correspondence to/from the local government.	PM						VITAL RECORD	
5C.103	1.1	Request for Authority to Destroy Unscheduled Records (Form SLR 501)	Submitted by local governments to TSLAC. Includes intent to dispose of public records and Requests for Authority to Destroy Unscheduled Records (Form SLR 501).	FE	20					CAUTION: Do not confuse this record series with other agency destruction requests. SEE Agency Item Numbers 1D.008, 5C.012, 5E.003, and 5E.004. VITAL RECORD 93-306-029	
5C.104	1.1	Local Government Schedules Database	Database includes records control schedule tracking checklist, date of receipt, date schedule approved/denied, analyst assignments, and any relevant notes regarding the approval process of the schedule.	US							



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					Years	Months	Days				
5C.105	1.1	Petitions to Retain School Records	Petitions from Countywide superintendent of the County Clerk's office to retain school records.	PM						VITAL RECORD	
5C.108	1.1	State Agency and Local Government Database Updates	Records and documentation used to update information in state agency and local government databases	AC				AC = Change made to database.			
5C.201	1.1	Training Program Records	Includes databases, registration, class rosters, class evaluations, training schedules, and other materials pertaining to the administration of the RMA training program.	FE	5					CAUTION: Do not confuse this record series with LD&N Workshop Participant Record - Agency Item Number 4.006.	
5C.304	5.1.007	Requisitions for In-Agency or Inter-Agency Copying and Printing Services	Includes word processing and data processing.	AV							
5C.400	1.1	Technical Library Card Catalog	Card catalog or index used to catalog materials of the RMA technical library	US						Note: After all records are dispositioned, consider removing item from retention schedule through amendment or next recertification.	



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5C.501	1.1	State Agency Retention Schedule Review Working Files (R02 File)	Includes analyst checklists, corrections memoranda, notes, archives reports, storage memoranda, State Agency Retention Schedule and Amendments (STARS) checklist (Form SLR-123a), and related correspondence. Working file includes last recertification working materials and currently in process recertification working materials.	AC				AC = Next recertified schedule approved.		CAUTION: Be careful not to dispose of the State Agency Retention Schedule and Amendments (STARS) checklist (Form SLR123a) as a part of the retention schedule review working files; transfer to Agency Item Number 5C.011 for further retention. SEE Agency Item Number 5C.014 for retention instructions for these documents. SEE Agency Item Number 5C.010 for disposition instructions on working copies of state agency retention schedules.	
5C.502	1.1	Local Government Records Control Schedule Review Files	Records created to document the review of local government records control schedules	AC	3			AC = Schedule Approved.			
5C.506	1.1	Local Government Records Control Schedules - Working Copies	Working copies of local government records control schedules or amendment submissions	AV							



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5D.001	1.1	Camera Operators' Certificates	Includes Camera Operators' Certificates, Certificate of Authority, Retake Certificates, and Omission Certificates.	AC				AC = Life of film.		Record copy included on each roll of film.	
5D.002	5.2	Film Processing Control Charts	Documents quality control for microfilming process.	PM							
5D.005		Microfilm Control Logs (Form SLR 261)	Documents quality control from editing microfilm, including inspection report and reader log.	PM							
5D.008		Microfilm Production Logs (Form RMD 627)	Includes Camera Operator Production Log (Form RMD 627), Document Preparation Log, and Editor's Log.	PM						VITAL RECORD 94-306-084	
5D.011	1.1	Microfilm Program Compliance	Tracking file documenting compliance with state microfilming rules.	FE	3						
5E.001	1.1	Operations Data	Reports from OmniRIM and Texlinx Systems at SRC	FE	10					TexLinx implemented May 2015. After retention met on old system reports, update title to only current system name at next amendment or recertification. 95-306-095	
5E.002	1.2	Destruction Request Logs	Includes Form RMD 102, 105 log, and state agency destructions.	AC	25			AC = Records disposition finalized.		VITAL RECORD	



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5E.003	1.2	Original Requests for Authority to Dispose of State Records (TX-R-6, RMD 102)	Includes destruction requests, acknowledgements, and supporting documentation from state agencies, as well as a copy of the end of the year report from Agency Item Number 5E.002.	AC	25			AC = Records disposition finalized.		CAUTION: Do not confuse this record series with other agency destruction requests. SEE Agency Item Numbers 1D.008, 5C.012, and 5C.103. VITAL RECORD 93-306-028		
5E.005	1.2	Records Destruction Documentation	Working papers that document records destruction from the State Records Center (SRC).	FE	5					Note: After all records are dispositioned, consider removing item from retention schedule through amendment or next recertification. 97-306-147		
5E.007	1.2	Storage Approval Log	Used prior to Texlinx for isolating series for storage at SRC (106 numbers)	US						Note: After all records are dispositioned, consider removing item from retention schedule through amendment or next recertification.		



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5E.009	1.2	Storage Approval Forms (Form RMD 106)	Forms that document the initiation or change in storage information and Form RMD 106 storage number assignments for a particular record series listed on an agency's approved retention schedule.	FE	5					Note: Stopped creating these in January 2016. After all records are dispositioned, consider removing item from retention schedule through amendment or next recertification.	
5E.010	1.1	Transmittal Tracking Log (Form RMD 101)	Log used to track all 101 numbers prior to Texlinx	FE	5					Note: After all records are dispositioned, consider removing item from retention schedule through amendment or next recertification.	
5E.011a	1.2	Transmittals - Index (Form RMD 101)	Used prior to Texlinx so customers could track their holdings at SRC	AC	25			AC = Final transfer from storage or destruction of records and paper filmed at the end of each fiscal year.		Note: After all records are dispositioned, consider removing item from retention schedule through amendment or next recertification. VITAL RECORD 92-306-019	





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					Years	Months	Days					
5E.012	1.2	Transmittals -Originals (TX-R-5, RMD 101)	Includes Form RMD 101, Tx-R-5, 306-58-1, and Agency Storage Forms. Forms indicate records transferred to storage or a transfer of legal custody. Includes both the State Records Center (SRC) and imaging files.	AC	25			AC = Final disposition of all records on transmittal or permanent transfer to agency.		Note: After all records are dispositioned, consider removing item from retention schedule through amendment or next recertification. VITAL RECORD 92-306-018		
5E.014	1.2	Rejected Transmittals (Form RMD 101/101C)	Items rejected for storage for various reasons prior to Texlinx	AC				AC = After corrected or 3 months, whichever occurs first.		Note: After all records are dispositioned, consider removing item from retention schedule through amendment or next recertification. Replaced with Texlinx Delivery Report.		
5E.015	1.2	Permanent Transfers	Paper copies of indexes regarding permanent removals	AC	25			AC = Final transfer to agency.		Note: After all records are dispositioned, consider removing item from retention schedule through amendment or next recertification. ; Perm outs are handled through Texlinx and are reflected in the item's status after May 2015. VITAL RECORD 92-306-022		



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5E.017	1.2	Texas Delivery Report and Receipt	Used to verify invoiced activities with physical signature on report. SRC keeps this copy, customer receives a copy with driver's signature.	FE	7					Perm outs are handled through Texlinx and are reflected in the item's status after May 2015.	
5E.018		Delivery Schedules	Documentation of daily delivery routes may include work, duty, shift, crew, or case schedules, rosters, or assignments.	AC	2			AC = Completion and verification of delivery.			
5E.019	1.2	Document Requests	Requests from state agencies for files and boxes from the SRC via TexLinx.	FE	3					92-306-020	
5E.024	1.2	Disaster Recovery Service Authorizations (Form RMD 113)	Disaster Recovery Vault access control form (access to DR vault in emergency situation)	US	1					VITAL RECORD	
5E.025	1.2	Disaster Recovery Service Transmittals (Form RMD 109)	Form used to schedule movement of Disaster Recovery materials – replaced by Texlinx. (109 forms no longer used to track or schedule DR)	FE	1					DR is moved through electronic processes of Texlinx and receipted through the Texas Delivery Report. VITAL RECORD 92-306-024	



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5E.026	5.4	Surveillance Video	Video surveillance of the State Records Center grounds and parking lots.		1					SEE Agency Item Number 3C.051 for ARIS surveillance video. CAUTION: Surveillance video is automatically overwritten every month at an offsite location. The disposal of this video information need not be documented through destruction signoffs (GEN.034/3A.072) or in records disposition logs (3A.046). If surveillance video is needed as part of an investigation, maintain recording in accordance with corresponding record series applicable to incident or investigation.	
5E.027	5.1.012	Service Fee Schedules	Storage and Imaging Schedules of prices charged by an agency for services to the public or other agencies, including any documentation used to determine the SRC charges.	US	3					Previously 5A.050, 5D.003	



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5E.028	2.1	TexLinx Database System	Records management inventory control software used to accession, transfer, and destroy state agency and local government records to the State Records Center (SRC).	AC				AC = Until database is superseded by new database and the transfer or migration of data and information has been completed and verified.			
5E.029	1.2.010	Disposition Index	Excel Through April 2015	AC	50			AC = 1-May-15		All disposition index information was migrated to Excel spreadsheets in April 2015.	
6.001	1.1	Copyright Records	Correspondence, memos, and forms dealing with requests for permission to record copyrighted publications.	PM						VITAL RECORD	
6.002	1.1	Patron Files	Includes patron applications that are pending, active, or denied.	AC	5			AC = Termination of service to patron.		Meets Library of Congress Rules and Regulations, Administrative Procedures No. 9.8.3. CONFIDENTIAL AND VITAL RECORD	
6.004	1.1	School Registration Forms	Forms submitted by schools to register eligible students for service from TBP.	FE	1					CONFIDENTIAL RECORD	
6.007	1.1	Disability Reference Information	Database that tracks reference questions and answers for Disability Information and Referral Center (DIRC) Coordinator.	US							



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6.030	3.3.020	Work Schedules/Assignments	Work, duty, shift, crew, or case schedules, rosters, or staff assignments.	FE	1						
6.040	5.1	Machine Repair Annual Reports	Machine lending coordinator receives reports from each of the 7 repair facilities. They calculate and report the total number of machines repaired in the state for a particular year and send information to the National Library Service (NLS).	FE	5						
6.044	5.2	Warranty Repair Report	Listings, forms, and reports noting status of machines returned for warranty service.	AC				AC = Transfer of information into annual listing.			
6.045	5.2.019	Service Orders	Agency copy of forms completed by mechanical service personnel for installation or repair. Includes billing code, service, labor, parts, remarks, and list of repairs done on specific machines by Pioneer Center each month.	FE	1					SEE Agency Item Numbers 1F.021 and 5B.005 for other similar record series that have varying retention requirements.	



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6.048	4.2.005	Order/Packing Slips and Receiving Reports	Requisitions, orders, receiving reports, invoices, or statements, change orders, best value determinations, etc. Includes shipping and invoice information from National Library Services (NLS) and Multistate Center West (MSCW) for items sent to TSLAC such as machines, machine parts and accessories, tools, batteries, boxes, and styrofoam, etc.	FE	3						
6.049	5.2.015	Monthly Machine Reports	Statistical reports (counts) of National Library Services (NLS) playback machines that have been assigned to TSLAC, which includes obsolete, damaged, transferred, and lost or stolen.	FE	3						
6.052	1.1	TBP Books Database	Information on the production of books on tape in the recording studios.	AV							



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6.056	2.1.001	Processing Files	Machine-readable files used in the creation, utilization, and updating of master files.	AC				AC = When all requirements for records being created from the correlating program database have been satisfied or completed, or 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: Records management officers must be certain before assigning the retention period of AC to agency automated processing files that the files do not fall under records series listed elsewhere. VITAL RECORD	
6.057	1.1	Interlibrary Loan (ILL) and Multistate Center Request Forms	Forms requesting ILL titles.	FE	1						
8.002	4.5.006	Annual Operating Budgets Required by the General Appropriations Act.		FE	3					CAUTION: Do not confuse this record series with the Operating Budget held in ADMIN that requires a longer retention period. SEE Agency Item Number 1B.036.	



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8.005	1.1.004	Legislative Appropriation Requests (LAR)	Biennial Budget Requests and Supporting Documentation Including any supporting documentation created and/or used to justify and support legislative appropriations requests by an agency.	AC	6			AC = September 1 of odd-numbered calendar years.	A	ARCHIVES NOTE: The archival requirement is met by sending the required copies of the requests to the Texas State Publications Depository Program, TSLAC. Only copies of supporting documentation submitted to the Legislative Budget Board (LBB) are archival.		
8.018	1.1.023	Organization Charts		US					A			
8.032	1.1.041	Staff Suggestions and Responses	Suggestions submitted by agency personnel and responses.	FE	1							
8.033	1.1.026	Texas Register Submissions and Notice of Open Meetings	Copies of all proposed, withdrawn, emergency, and adopted rules; open meetings notices; or any other documents required by law to be submitted to the Texas Register.	AC	5			AC = Date of publication in the Texas Register.				
8.040	1.1.053	Registration Logs	Logs or similar records used to register persons appearing before state agencies as required by Chapter 2004, Government Code, including quarterly reports filed with the Texas Ethics Commission.	AC				AC = Report filed with the Texas Ethics Commission.				





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8.041	1.1.055	Strategic Plans	Information resources and operational strategic plans prepared in accordance with 2054.095 and 2056.002, Government Code.	AC	6			AC = September 1 of odd-numbered calendar years.	A	ARCHIVES NOTE: The archival requirement is met by sending the required copies of the plans to the Texas State Publications Depository Program, TSLAC.	
8.050	1.1.066	Reports - Biennial or Annual Agency (Narrative)	Biennial narrative reports to the governor and legislature as required by an agency's enabling statutes, including annual narrative reports if they are required by statute.	AC	6			AC = September 1 of odd-numbered calendar years.	A	ARCHIVES NOTE: The archival requirement is met by sending the required copies of the reports to the Texas State Publications Depository Program, TSLAC.	
8.052	5.4.011	Visitor Registers and Logs	Logs, registers, or similar records documenting visitors to limited access or restricted areas of agency facilities, including research room registrations and the agency visitor log book.	FE	3					SEE Agency Item Number 5A.001 for SLRM visitor registers and logs. Previously 3B.003, 3B.018	
8.053	3.1.037	Employee Recognition Records	Letters of recommendation and support, applications, and other correspondence and notes that document the screening and selection process for awards, incentives, tenure, or other information needed for the Employee of the Quarter (EOQ) Ceremony.	AC	5			AC = Termination of employment.		SEE ALSO Agency Item Number 1E.055 for Human Resources (HR) awards, incentives, and tenure records.	



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8.061	1.1.074	Sunset Review Report and Documentation	Annual, sub-annual, or special studies on non-fiscal reports on agency's programs, services, or projects.	AC	12			AC = After the subsequent Sunset Review.	R		
8.075	5.2.028	Building Construction Contract and Inspection Records	Building construction contracts, surety bonds, and inspection records.	LA	10				R	SEE ALSO Agency Item Numbers GEN.064 and GEN.065. VITAL RECORD	
8.076	5.4.011	Welcome Desk Visitor Registers and Logs	Logs, registers, or similar records documenting visitors to limited access or restricted areas of agency facilities, including research room registrations and the agency visitor log book.	FE	3					SEE Agency Item Number 5A.001 for SLRM visitor registers and logs. Previously 3B.003, 3B.018, 3C.052 SEE Agency Item Number 8.076.	
GEN.001	1.1	Special Project Files	Unique projects conducted by agency staff that do not fit under another record series grouping. Includes notes, reference materials, work papers, meeting minutes, correspondence related to the project, and any other supporting documentation needed throughout the duration of the project. Includes Data Center Consolidation Project (DCS).	AC				AC = The duration of the project and until any subsequent needs have been satisfied.	R	CAUTION: Do not confuse this record series with other specific special project files that might have a longer retention period. SEE Agency Item Numbers 3A.028, 3B.008, 3E.003, 4.042, or other corresponding record series as applicable. Previously 2.045, 3A.054, 5.001, 8.064 In some cases certain special project files might be considered VITAL RECORDS	



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GEN.002	1.1	Planning, Analytical, and Professional Committee Records	Internal and external professional committees and work groups. Includes notes, work papers, and reference materials.	AC				AC = Termination of service on committee, disbanding of committee, or records of committee no longer administratively valuable to the agency.		CAUTION: Do not confuse this record series with records of governing bodies such as state boards, committees, commissions, and councils. SEE Agency Item Numbers GEN.021, GEN.022, GEN.023, GEN.024, GEN.025, or other related record series as applicable. Previously 5.005	
GEN.003	1.1	Denied Social Media Comments	Documentation includes text of denied comment, date of the comment, and all documentation discussing the reason for the comment's rejection from posting on an agency's social media site.	FE	2					SEE Agency Item Number GEN.006 if denied comment leads to a formal complaint.	
GEN.004	1.1.020	Public Information Requests - Exempted and Not Exempted	Includes all correspondence, records certification affidavits, and all other documentation relating to requests for records that are furnished to the public or that are exempt under Public Information Act (Chapter 552, Government Code).	AC	2			AC = Date request fulfilled or notification that records are exempt.		This title includes both 1.1.020 - Public Information Requests - Not Exempted and 1.1.021 -Public Information Requests – Exempted.	



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					Years	Months	Days				
GEN.005	1.1.002	Audits	Audits and reviews performed by, on behalf of an agency, or on an agency, including the working papers that support the audit. This also includes external audits, audit reports, Records Management Assistance (RMA) audit files, and audits on government furnished equipment.	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. Previously 1A.002, 2.039, 5A.012, 5C.109, 6.008, 8.004	
GEN.006	1.1.006	Complaint Records	Complaints received by an agency from the public concerning the agency and records pertaining to the resolution of the complaint.	AC	2			AC = Final disposition of the complaint.		CAUTION: If a complaint becomes the subject of litigation, it must be included in and is subject to the minimum retention period of Agency Item Number GEN.019. Previously 3C.018, 6.009, 8.006	



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GEN.007a	1.1.007	Administrative Correspondence (Executive, et al)	Incoming/outgoing and internal correspondence, in any media, pertaining to the formulation, planning, implementation, interpretation, modification, or redefinition of the programs, services, or projects of an agency and the administrative regulations, policies, and procedures that govern them.	FE	4				R	ARCHIVES NOTE: Only the administrative correspondence of executive staff, board or commission members, division directors, and program heads require archival review. CAUTION: This records series and Agency Item Number GEN.008 should be used only for correspondence that is not included in or directly related to another 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 Agency Item Number 2.042 or 8.005; a letter concerning an audit for that prescribed by Agency Item Number GEN.005, etc. SEE ALSO Agency Item Number GEN.010. SEE Agency Item Number 3A.023 or 4.05 for grant related correspondence.	



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					Years	Months	Days				
GEN.007b	1.1.007	Administrative Correspondence (Non-Executive, et al)	Incoming/outgoing and internal correspondence, in any media, pertaining to the formulation, planning, implementation, interpretation, modification, or redefinition of the programs, services, or projects of an agency and the administrative regulations, policies, and procedures that govern them.	FE	4					CAUTION: This records series and Agency Item Number GEN.008 should be used only for correspondence that is not included in or directly related to another 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 Agency Item Number 2.042 or 8.005; a letter concerning an audit for that prescribed by Agency Item Number GEN.005, etc. SEE ALSO Agency Item Number GEN.010. SEE Agency Item Number 3A.023 or 4.05 for grant related correspondence.	



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GEN.008	1.1.008	General Correspondence	Non-administrative incoming/outgoing and internal correspondence, in any media, pertaining to or arising from the routine operations of the policies, programs, services, or projects of an agency, including patron research requests and correspondence and resumes from potential job applicants that do not identify a certain position they wish to apply for.	FE	2					SEE comment to Agency Item Number GEN.007. SEE ALSO Agency Item Number GEN.009. SEE Agency Item Number 3A.023 or 4.05 for grant related correspondence.	
GEN.009	1.1.010	Directives	Any document that officially initiates, rescinds, or amends general office procedures.	US	1					Previously 5A.002, 6.012, 8.037	
GEN.010	1.1.011	Executive Orders	Any document that initiates, rescinds, or amends a regulation, policy, or procedure that governs the programs, services, or projects of an agency.	US	3				A	Previously 1A.001, 5A.003, 8.012 VITAL RECORD	



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GEN.011a	1.1.013	Calendars, Appointment, and Itinerary Records (Executive)	Calendars, appointment books or programs, and scheduling or itinerary records, purchased with state funds or maintained by staff during business hours that document appointments, itineraries, and other activities of agency officials or employees.	CE	1				R	ARCHIVES NOTE: Only the calendars, appointment, and itinerary records of elected officials, executive staff, and board or commission members require archival review. 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 this retention period. SEE Open Records Decision 635 issued in December 1995 by the Attorney General. Previously 1A.006, 2.032, 3A.033, 3B.017, 4.014, 5.013, 6.013, 8.010, 9.013	





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GEN.011b	1.1.013	Calendars, Appointment, and Itinerary Records (Non-Executive)	Calendars, appointment books or programs, and scheduling or itinerary records, purchased with state funds or maintained by staff during business hours that document appointments, itineraries, and other activities of agency officials or employees.	CE	1						
GEN.012	1.1.014	Legal Opinions and Advice	From agency legal counsel or the Attorney General, including any requests eliciting the opinions.	AV					R	CAUTION: Does not include legal opinions or advice rendered on a matter in litigation or with regard to pending litigation. SEE Agency Item Number GEN.019. Previously 5A.048, 8.003	
GEN.013	1.1.019	Public Relations Records	News, press releases, or any public relations files maintained or issued by an agency. Includes print, electronic, audio, audiovisual records, or records in any media.	FE	2				R	Previously 6.014, 8.023	



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GEN.014	1.1.024	Plans and Planning Records	Plans and records relating to the process of planning new or redefined programs, services, or projects of an agency that are not included in or directly related to other records series in this schedule.	AC	3			AC = Decision made to implement or not to implement result of planning process.	R	ARCHIVES NOTE: Data processing planning records are not archival. Previously 1A.013, 2.013, 3A.035, 3C.049, 4.016, 5A.009, 6.015, 8.022, 9.015	
GEN.015	1.1.027	Proposed Legislation	Drafts of proposed legislation and related correspondence.	AV						Previously 5.016, 8.024	
GEN.016	1.1.038	Customer Surveys	Surveys returned by the customers or clients of an agency, and the statistical data maintained rating an agency's performance, including Readership Surveys.	AC	3			AC = Final disposition of summary report.		SEE Agency Item Number GEN.029 for summary reports compiled from customer surveys. Previously 1A.020, 3C.019, 4.019, 5.205, 6.017, 8.009, 9.020	
GEN.017	1.1.040	Speeches, Papers, and Presentations	Notes or text of speeches, papers, presentations, or reports delivered in conjunction with agency work.	AC				AC = End of term in office or termination of service in a state position.	R	Previously 1A.018, 3A.014, 5.020, 8.029, 9.022	
GEN.018	1.1.043	Training Materials - External	Instructional materials developed by an agency for training entities or individuals it regulates or serves.	US	1					CAUTION: Do not confuse this record series with training materials for internal staff. SEE Agency Item Number GEN.051. Also, if the training is paid for by federal LSTA funds, SEE Agency Item Number 4.055.	



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GEN.019	1.1.048	Litigation Files	Records created by or on behalf of an agency in anticipation of or in the adjudication of a lawsuit. Each division maintains their own litigation files.	AC 1				AC = As applicable, decision of an agency not to file a lawsuit or decision that a lawsuit will not be filed against it on a matter; dismissal of a lawsuit for want of prosecution or on motion of the plaintiff; or final decision of a court (or of a court on appeal, if applicable) in a lawsuit. ARCHIVES NOTE: Cases that set legal precedent or exhibit historical value will be evaluated by the ARIS Division of TSLAC for archival preservation. Previously 8.039	R		



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GEN.020	1.1.057	Transitory Information	Records of temporary usefulness that are not an integral part of a records series of an agency, that are not regularly filed within an agency's recordkeeping system, and that are required only for a limited period of time for the completion of an action by an official or employee of the agency or in the preparation of an ongoing records series. Transitory records are not essential to the fulfillment of statutory obligations or to the documentation of agency functions. Some examples of transitory information, which can be in any medium (voice mail, fax, email, hard copy, etc.) are routine messages; telephone message notifications; internal meeting notices; routing slips; incoming letters or memoranda of transmittal that add nothing of substance to enclosures; and similar routine information used for communication, but not for the documentation, of a specific agency transaction.	AC				AC = Purpose of record has been fulfilled.		CAUTION: Records management officers should use caution in assigning this records series item number to records of an agency to make certain they are not part of another records series listed in this schedule or, for records series unique to an agency, are not part of a records series that documents the fulfillment of the statutory obligations of the agency or the documentation of its functions. The disposal of transitory information need not be documented through destruction signoffs (GEN.034 & 3A.072) or in records disposition logs (3A.046), but agencies should establish procedures governing disposal of these records as part of its records management plan (3A.071). Previously 1A.024, 2.031, 3A.032, 3B.016, 3C.015, 3D.016, 3E.032, 4.041, 5.008, 5.012b, 6.019, 8.042, 9.053	



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GEN.021	1.1.058	Meeting Agenda and Minutes	Official agenda and minutes of state boards, committees, commissions, and councils that conduct open meetings as required by Government Code, Chapter 551. Includes TSLAC Commission, Texas Historical Records Advisory Board (THRAB), Library System Act Advisory Board (LSAB), Records Management Interagency Coordinating Council (RMICC), TexShare Advisory Board, Local Government Records Committee (LGRC), Records Management and Preservation Advisory Committee (RMPAC), Electronic Records Advisory Committee (ERAC), and all other Committees, Councils, or Commissions.	PM					A	ARCHIVES NOTE: Agency retains permanent record copy. The archival requirement will be met by sending a copy to the ARIS Division of TSLAC. CAUTION: This records series and Agency Item Numbers GEN.022, GEN.023, GEN.024, and GEN.025 must be used for those state boards, committees, commissions, and councils, which by law or the biennial Appropriations Act, are administered by another state agency. These records and all others related to the functions of any of these dependent entities must be included in the records retention schedule of the administering agency. The Secretary of State's Office (SOS) retains any official copies of meeting minutes taken during RMICC Meetings. Previously 3A.008, 4.020, 5A.004, 8.035, 8.043, 9.064 VITAL RECORD	



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GEN.022	1.1.059	Certified Agendas or Tape Recordings of Closed Meetings	Certified agendas or tape recordings of closed meetings of state boards, commissions, committees, and councils. Includes TSLAC Commission, Texas Historical Records Advisory Board (THRAB), Library System Act Advisory Board (LSAB), Records Management Interagency Coordinating Council (RMICC), TexShare Advisory Board, Local Government Records Committee (LGRC), Records Management and Preservation Advisory Committee (RMPAC), Electronic Records Advisory Committee (ERAC), and all other Committees, Councils, or Commissions.	AC 2				AC = The date of the meeting or completion of pending action involving the meeting, whichever is later.		SEE CAUTION comment at Agency Item Number GEN.021.	Government Code, 551.104 (a)



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GEN.023	1.1.060	Audio or Videotapes of Open Meetings	Audio or videotapes of open meetings of state boards, commissions, committees, and councils. Includes TSLAC Commission, Texas Historical Records Advisory Board (THRAB), Library System Act Advisory Board (LSAB), Records Management Interagency Coordinating Council (RMICC), TexShare Advisory Board, Local Government Records Committee (LGRC), Records Management and Preservation Advisory Committee (RMPAC), Electronic Records Advisory Committee (ERAC), and all other Committees, Councils, or Commissions.	AC			90	AC = Official approval of written minutes of the meeting by the governing body of an agency.		CAUTION: Minutes of state agencies are permanent records. Audio and videotapes are not permanent media. State agencies may not retain audio or videotapes of the meetings of governing bodies in lieu of written minutes. The proceedings of all meetings of state boards, committees, commissions, and councils must be reduced to writing. SEE CAUTION comment at Agency Item Number GEN.021. The Secretary of State's Office (SOS) retains any official copies of audio or videotapes recorded at open RMICC Meetings. Previously 4.021, 8.044, 8.047	



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GEN.024	1.1.061	Meeting Notes	Notes taken during open meetings of state boards, commissions, committees, and councils from which written minutes are prepared. Includes TSLAC Commission, Texas Historical Records Advisory Board (THRAB), Library System Act Advisory Board (LSAB), Records Management Interagency Coordinating Council (RMICC), TexShare Advisory Board, Local Government Records Committee (LGRC), Records Management and Preservation Advisory Committee (RMPAC), Electronic Records Advisory Committee (ERAC), and all other Committees, Councils, or Commissions.	AC			90	AC = Approval of the formal minutes by the governing body.		SEE CAUTION comment at Agency Item Number GEN.021. The Secretary of State's Office (SOS) retains any official copies of meeting notes taken during RMICC Meetings. Previously 8.045, 8.048	





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GEN.025	1.1.062	Meeting Supporting Documentation	Documents submitted at meetings of state boards, commissions, committees, and councils including exhibit items, documentation for agenda items, etc. This supporting documentation also includes documents sent in advance of meetings for briefing purposes, some of which may not be submitted at an actual meeting. Includes TSLAC Commission, Texas Historical Records Advisory Board (THRAB), Library System Act Advisory Board (LSAB), Records Management Interagency Coordinating Council (RMICC), TexShare Advisory Board, Local Government Records Committee (LGRC), Records Management and Preservation Advisory Committee (RMPAC), Electronic Records Advisory Committee (ERAC), and all other Committees, Councils, or Commissions.	FE	2				A	SEE CAUTION comment at Agency Item Number GEN.021. Previously 4.023, 5A.005, 8.046, 8.049	



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GEN.026	1.1.063	Staff Meetings Minutes and Notes & Miscellaneous Non-Official Meetings Minutes and Notes	Minutes, notes, and supporting documentation taken at internal agency staff meetings (e.g., ATM) or miscellaneous non-official meetings (e.g., RMICC, NAGARA, etc.)	FE	1					Previously 1A.009, 2.004, 3A.068, 5.014, 8.030, 9.023	
GEN.027	1.1.064	Agency Performance Measures 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. Including, but not limited to the following: Monthly Reports to the Assistant State Librarian, Monthly Statistical Activity Report, Division/Employee Reports of Service Transactions, State Agency Retention Schedule and Certification Report, Darkroom Production Report, Manager Production and Time Reports, and any work papers or raw data that supports a performance report.	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. Previously 3A.003, 3A.004, 3A.013, 3B.015, 3C.008, 3D.012, 4.024, 5.003, 5C.002, 5D.009, 5D.010, 6.020, 8.019, 9.067 VITAL RECORD	



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GEN.028	1.1.065	Reports and Studies (Non-Fiscal) - Raw Data	Information or data collected and compiled for the purpose of producing non-fiscal reports. Including, but not limited to the following: Internal Investigative Reports, Regional Historical Resource Depository (RHRD) Reports and Studies -Raw Data, Administrative Subject Files, Statewide Cost Allocation Plan Data, Collection Development Tracking Reports, Sex Profanity Violence (SPV) Report, Book Evaluations, and Program Analysis Data.	AV						CAUTION: Does not include source documentation used for information or data included or directly related to another record series in this schedule. SEE especially Agency Item Number GEN.027.	



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GEN.029	1.1.067	Reports and Studies (Non-Fiscal)	Annual, sub-annual, administrative, 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.	FE	3				R	ARCHIVES NOTE: For agencies that have had an archival appraisal, separate this records series by each type of archival coding, A, R, or E. SEE page ix of the 4th Edition of the Texas State Records Retention Schedule (RRS) for more information. CAUTION: Do not confuse this record with ARIS Collection Statistics, SEE Agency Item Number 3E.024. Previously 1A.016, 2.023, 3A.012, 5.018, 5A.011, 6.021, 8.026, 9.028	
GEN.030	1.1.068	Reports on Performance Measures	Quarterly and annual reports on agency performance measures submitted to executive and legislative offices.	AC	6			AC = September 1 of odd-numbered calendar years.		Previously 3A.052, 8.028	
GEN.031	1.1.069	Activity Reports	Reports compiled by agency personnel on a daily or other periodic basis pertaining to workload monitoring, task completion times, number of public contacts, and similar activities.	FE	1					CAUTION: SEE Agency Item Number GEN.027. Previously 2.040, 3A.056, 3A.061, 6.022	



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GEN.032	1.1.070	Agency Rules, Policies, and Procedures - Final	Manuals, guidelines, administrative rules, or similar records distributed internally for the use of employees or externally to the public or those individuals or entities regulated by an agency that sets out the rules, policies, and procedures that govern an agency's programs, services or projects. Any agency, division, department, project, and program rules, regulations, policies, and procedures, which includes but is not limited to the Employee Guide, Email Policy, Social Media Policy, Website Policy, Ethics Policy, Volunteer Handbook, and all other similar agency or division policies, procedures, and rules.	AC	3			AC = Completion or termination of program, rules, policies, or procedures.	R	SEE ALSO Agency Item Number GEN.033. CAUTION: Do not confuse this record series with Agency Item Numbers 1B.001, 2.005, or any other specific policy that merits a longer retention.	



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					Years	Months	Days				
GEN.033	1.1.071	Agency Rules, Policies, and Procedures - Working Files	Working files used in the development of manuals, guidelines, administrative rules, or similar records distributed internally for the use of employees or externally to the public or those individuals or entities regulated by an agency that sets out the rules, policies, and procedures that govern an agency's programs, services, or projects.	AC	3			AC = Completion or termination of program, rules, policies, or procedures.	R	SEE ALSO Agency Item Number GEN.032. Previously 1B.075, 5.002	
GEN.034	1.2.001	Division Destruction Authorizations	Division level documents authorizing final disposition of records under a certified records retention schedule.	FE	3					Previously 5C.503	
GEN.035	1.2.003	Forms History File	Print masters of the original version and all subsequent revisions to an agency form, including any associated design or design modification requests.	AC	1			AC = Discontinuance of use of form.		Previously 3A.016, 5C.302, 6.023, 8.013, 9.031	
GEN.036	1.2.004	Forms Inventory or Log	Any periodic listing or log of all forms used internally or externally by an agency.	US						Previously 5C.303	



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GEN.037	1.2.013	Records Control Locator Aids	Includes indexes, card files, shelf lists, registers, guides, etc. Including, but not limited to: Records Control Materials, Regional Historical Record Depository (RHRD) Consolidated Holdings Summary, Storage Indexes, Texas Documents Disposal Lists, Texas Publications Databases, and Microfiche Headers List.	AC				AC = When control aid is updated, revised, or no longer needed.		CAUTION: These records must carry the same retention period and archival code of the records they support. Previously 3A.017, 3B.009, 5.022, 9.006, 9.037, 9.051 3B.009, 9.037 VITAL RECORD	



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GEN.038	1.3.001	State Publications	One copy of each state publication as defined on page xi of the 4th Edition of the Texas State Records Retention Schedule (RRS), except a publication that is subject to a different retention period in this schedule. For example, a meeting agenda (SEE Agency Item Number GEN.021) also meets the definition, but it must be retained permanently; Agency Item Numbers 1B.002, 2.022, 2.042, 8.005, 8.041, 8.050, and GEN.030, which also meet the definition, are closely associated with the appropriations process and must be retained AC + 6.	AC 2				AC = Until superseded or obsolete.			CAUTION: Do not confuse this record series with TBP Publications, SEE Agency Item Number 6.024. Many state publications must be submitted to the Texas State Publications Depository Program, TSLAC, by law (TGC §441.103 - 441.1035). TSLAC 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 TSLAC (13 TAC §3.1 - §3.8). Previously 1A.014, 4.025, 5.017, 8.031, 9.034	Administrative Code, Title 13, Part 1, Chapter 3, Rule §3.2, (e) & Administrative Code, Title 13, Part 1, Chapter 6, Subchapter A, §6.1 thru §6.10		





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GEN.039	1.3.002	Publication Development Files	Background material, copies (drafts or working copy), original artwork, photo negatives, prints, flats, etc. This includes all work performed both inside and outside the agency, including the commission's publication development files.	AV					R	Previously 1A.015, 3A.010, 4.026, 5c.301, 6.025, 8.025, 8.062, 9.036	
GEN.040	2.1.007	Software Programs and Job Control Language	Automated software applications and operating system files including job control language, program listing/source code, etc. Also includes client-level software to access and interface with a server-based application such as Applications Development Programs.	AC				AC = Until electronic records are transferred to and made usable in a new software environment or there are no electronic records being retained to meet an approved retention period that require the software to be retrieved and read.		CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records. Previously 2.009, 2.010, 3A.019, 6.026, 8.070, 9.042 VITAL RECORD	Administrative Code, Title 13, Part 1, Chapter 6, Subchapter C, Rule, §6.94



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					Years	Months	Days				
GEN.041	2.1.008	Hardware Documentation	Records documenting operational and maintenance requirements of computer hardware such as operating manuals, hardware/operating system requirements, hardware configurations, and equipment control systems.	AC				AC = Until electronic records are transferred to and made usable in a new 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.		CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records. Previously 2.014, 6.055, 9.043 VITAL RECORD	Administrative Code, Title 13, Part 1, Chapter 6, Subchapter C, Rule, §6.94



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GEN.042	2.1.009	Technical Documentation	Records adequate to specify all technical characteristics necessary for reading or processing of electronic records and their timely, authorized disposition including documentation describing how a system operates and necessary for using the system such as user guides, system or sub-system definitions, system specifications, input and output specifications, and system flow charts; program descriptions and documentation such as program flowcharts, program maintenance logs, change notices, and other records that document modifications to computer programs; and data documentation necessary to access, retrieve, manipulate, and interpret data in an automated system such as a data element dictionary, file layout, code book or table, and other records that explain the meaning, purpose, structure, logical relationships, and origin of the data elements. Includes records related to Texas Agency Records Management System (TARMS), Automated Applications, etc.	AC				AC = Until electronic records are transferred to and made usable in a new hardware or software environment with new documentation or there are no electronic records being retained to meet an approved retention period that require the documentation to be retrieved and read.		CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records. Previously 2.008, 3A.018, 3A.055, 6.027 2.008, 3A.018, 6.027 VITAL RECORD	Administrative Code, Title 13, Part 1, Chapter 6, Subchapter C, Rule, §6.94



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GEN.043	2.2.014	Internet Cookies	Data resident on hard drives that make use of user-specific information transmitted by the Web server onto the user's computer so that the information might be available for later access by itself or other servers.	AV						The disposal of Internet cookies need not be documented through destruction authorizations (GEN.034/3A.072) or in records disposition logs (3A.046), but agencies should establish procedures governing disposal of these records as part of its records management plan (3A.071).	
GEN.044	2.2.015	History Files - Websites	A record of the documents visited during an Internet session that allows users to access previously visited pages more quickly or to generate a record of usage of a state-owned computer.	AV						The disposal of history files need not be documented through destruction authorizations (GEN.034/3A.072) or in records disposition logs (3A.046), but agencies should establish procedures governing disposal of these records as part of its records management plan (3A.071).	



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GEN.045	3.1.019	Manager Employee Performance Files	Manager's supporting notes, documentation, correspondence, memoranda, kudos, or reports related to the evaluation of an employee's job performance that is used for the performance appraisal (1E.034).	AC	2			AC = Date evaluation is completed or termination of employment, whichever sooner.		CAUTION: Be careful, Agency Item Number GEN.046 and GEN.047 might also be held in the Manager Employee Performance Files, but these documents may not be destroyed until the retention requirements for that record series have been met.	
GEN.046	3.1.006	Employee Counseling Records	Notes, memoranda, or reports relating to the counseling of an employee for work-related, personal, or substance abuse problems. Usually maintained at the supervisory level.	AC	3			AC = Termination of counseling.		Previously 6.028, 9.057 CONFIDENTIAL RECORD	



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GEN.047	3.1.020	Personnel Corrective Action Documentation	Corrective actions are those actions which do not affect pay, status, or tenure and are imposed to correct or improve an employee's job performance. Personnel Corrective Action Documentation is also referred to as an Improvement Plan, but is not a disciplinary action.	AC	5			AC = Termination of corrective action.		CAUTION: If, during the retention period of this records series, any part of this series is used to document and support personnel disciplinary action under Agency Item Number 1E.010, all documentation from this series used to support disciplinary action must be forwarded to Human Resources. Previously 2.015, 3A.020, 4.029, 6.029, 9.045 CONFIDENTIAL RECORD	
GEN.048	3.3	Community Service and Volunteer Program Files	Includes application, agreements, waivers, registration, correspondence, forms signed by docents or volunteers, parental approval acknowledgements, personal information, offense (if applicable), Travis County assignments, training documentation, evaluations, log of hours, time sheets, or lists of total hours worked, or any other applicable record.	AC	5			AC = Date of Separation or end of terms of service.		Previously 3B.021, 3C.034, 6.006 CONFIDENTIAL RECORD	



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GEN.049	3.3.025	Job Procedure Records	Any documents detailing the procedural duties and responsibilities of agency positions on a position-by-position basis, including the standard operating procedures manual for each position in the agency.	US	3					CAUTION: Do not confuse this record series with general agency office procedures. SEE Agency Item Number GEN.063. Previously 1E.061, 8.015	
GEN.050	3.3.027	Aptitude and Skills Tests	Aptitude or skills tests required of job applicants or of current personnel to qualify for promotion or transfer. Each division is responsible for maintaining notes, key to each exam version, etc. Includes In-Basket Exercise.	US	2					CAUTION: One copy of each different test (different in terms of either questions or administration procedures) should be retained for the period indicated. Previously 3A.067	29 CFR §1602.31



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GEN.051	3.3.030	Training Administration Records - Internal	Instructional materials and other records associated with in-house training of agency personnel on personnel policies and procedures and other policies and procedures that govern an agency's programs, services, or projects. Including, but not limited to internal training on Human Resources (HR) related topics, Records and Information Management (RIM), Information Security, Disaster Recovery, or any other internal policy or procedure that necessitates training staff.	US	2					CAUTION: Do not confuse this record series with training materials for external entities or individuals TSLAC regulates or serves. SEE Agency Item Number GEN.018. Previously 1E.053, 3A.071a, 8.065	
GEN.052	3.4.007	Leave Requests	Leave request forms (Part A) or correspondence documenting division level approval for staff to take sick leave, vacation, comp time, holiday comp, or overtime.	FE	3					CAUTION: This record series is for those leave requests that only require division level approval and are not forwarded to Human Resources (HR). SEE Agency Item Number 1E.046 for those requests that do require HR approval. Previously 2.017, 3A.021, 4.031, 6.031	





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GEN.053	4.1.007	Transfers or Budget Revisions	Transfers or adjustment to budgets including Transmittal of Funds/Cost Center Transfer Spreadsheet and all appropriation and budget documents. Including, but not limited to Uniform Statewide Accounting System (USAS) A, B, and U documents and logs of sequential numbering system required for these document types when entered into USAS.	AC	3			AC = The date of submission of the last expenditure report for the final year of each 5-year plan.		Previously 1B.014, 6.064	2 CFR §200.333
GEN.054	4.2	Staff Development Travel Vouchers (TV) and Travel Authorization Requests (TAR) - No Funds Involved	Record copy for division only when no funds are involved.	FE	3			AC = The date of submission of the last expenditure report for the final year of each 5-year plan.		CAUTION: This record series should be used only for travel vouchers (TV) and TARs that do not involve any funds or reimbursement to the employee. If reimbursement of funds is required, SEE Agency Item Number 1B.020. Previously 5A.035	2 CFR §200.333



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GEN.055	4.5.001	Worksheets for Preparing Fiscal Reports	For example, Biennial Budget Work Papers	AC	3			AC = The date of submission of the last expenditure report for the final year of each 5-year plan.		CAUTION: Do not confuse this record series with Agency Item Number 5.024. Previously 2.018, 3A.022, 5.025, 6.033, 8.054, 9.059 5.025 VITAL RECORD	2 CFR §200.333
GEN.056	4.5.002	Internal Fiscal Management Reports	Includes agency monthly budget reports, including Uniform Statewide Accounting System (USAS) daily and monthly reports on financial transactions.	FE	3					Previously 1B.057, 1B.081, 1B.082, 2.043, 3A.041, 8.014 1B.057 VITAL RECORD	
GEN.057	4.5.005	External Fiscal Reports	Special purpose reports such as federal financial reports or salary reports. These also include Historically Underutilized Business (HUB) Reports and Planned Procurement Schedule, including spreadsheets, correspondence, and additional raw data to create the report.	AC	3			AC = The date of submission of the last expenditure report for the final year of each 5-year plan.		Previously 1B.056, 2.046, 4.053	2 CFR §200.333



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GEN.058	4.6.002	Reconciliations	Including, but not limited to: Retirement Reconciliations, which include monthly Employee Retirement Systems (ERS) Contributions Reconciliation Reports and Employee Retirement Account Refund Applications; Automated Budget and Evaluation Systems of Texas (ABEST)/ Uniform Statewide Accounting Systems (USAS) Quarterly Reconciliations; Insurance Premium Reconciliations, including TexFlex summary and payment detail reports; and any other reconciliation records not previously listed under another record series.	FE	3					Previously 1B.040, 1B.055, 1E.025, 3B.020	



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GEN.059	5.1.001	Contracts and Leases	Contracts, leases, and agreements include general obligation, land lease, utilities, and construction, except for buildings. Documents contain specifications, affidavits of publication of calls for bids, accepted bids, performance bonds, contracts, purchase orders, inspection reports, and contract related correspondence. Including, but not limited to Regional Historical Resource Depository Agreements (RHRD), Loan Agreements (Items on Display), service contracts for storage and imaging at the State Records Center (SRC), TexShare, and Resource Sharing Program Agreements, etc.	AC 7				AC = Expiration or termination of the instrument according to its terms.		SEE related agency item numbers 1E.070 Performance Bonds, 1G.017 Bid Documentation, and 8.075 Building Construction Contracts. Previously 1C.005, 2.037, 3A.053, 3B.011, 8.068, 9.061, 9.063 VITAL RECORD	Government Code, §441.1855



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					Years	Months	Days				
GEN.060	5.1.004	Communications Lists	Any mailing address, telephone, fax number, email address, emergency contact information, or any other miscellaneous list of information maintained by the Texas State Library and Archives Commission (TSLAC) on its employees, entities or persons it serves, supplies, tasks, or other various types of information collected	US						CAUTION: Make certain the list is not part of another record series listed in this schedule such as Agency Item Number GEN.001 - Special Project Files or GEN.074 - Event Planning Records. Some personal identifying information may be a CONFIDENTIAL RECORD	
GEN.061	5.1.010	Licenses and Permits for Non-Vehicles	Does not include licenses and permits issued by an agency as part of its statutory responsibilities.	AC	2			AC = Expiration date of license or permit.			
GEN.062	5.1.011	Photocopier and Fax Usage Logs & Reports		AV							
GEN.063	5.1.014	Office Procedures	Any internally distributed manual, guidelines, or similar records that establish standard office procedures for an agency. For example, agency style manuals, telephone protocols, mail room procedures, print shop and photocopy ordering instructions, purchasing procedures, cataloging procedures, etc.	US	1					CAUTION: Do not confuse this record series with job procedures that are specific to certain positions in the agency. SEE Agency Item Number GEN.049. Previously 1G.001, 3C.025, 3E.010, 4.040, 6.036, 8.055, 9.066	



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GEN.064	5.2.002	Building Construction Project Files	Planning, design, and construction records; accepted and rejected bids; correspondence; etc.	AC	10			AC = Completion of project.	R	SEE ALSO Agency Item Numbers GEN.065 and 8.075. Previously 5b.015, 6.061, 8.057 VITAL RECORD		
GEN.065	5.2.003	Building Plans and Specifications - State Owned	Includes architectural and engineering drawings, profiles, and blueprints.	LA					R	SEE ALSO Agency Item Numbers GEN.064 and 8.075. Previously 3B.013, 5B.001, 8.058 VITAL RECORD		
GEN.066	5.2.008	Equipment History File; Equipment Service Agreements	Agreements or contracts between the agency and equipment vendor to provide maintenance service for equipment. Includes requests for installation, moves, service, repair logbooks, maintenance and production logs for equipment, etc.	LA	3					For service agreements or contracts related to equipment repairs and service, retain in accordance with agency item number GEN.059. Previously 3B.014, 3C.048, 3D.019, 5D.004, 6.037, 9.048		
GEN.067	5.2.010	Equipment Manuals	Each division is responsible for maintaining the equipment manual for equipment held in that division. Most manuals are now accessed online and are no longer in a hard copy.	LA						Previously 5B.003, 6.038, 9.049		
GEN.068	5.2.011	Equipment Warranties		AC	1			AC = Expiration of Warranty.		Previously 9.050		
GEN.069	5.4.002	Evacuation Plans and Drawings	Plans for evacuation of an agency facilities in cases of emergency.	US						Previously 5b.009		



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GEN.070	5.4.003	Inspection Records	Fire, safety, and other inspection records of agency facilities, equipment, and machines.	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 Agency Item Number 8.075. Previously 1F.009, 3B.005, 5B.010, 6.043	
GEN.071	5.4.010	Material Safety Data Sheets (MSDS)	Includes data regarding the properties of a particular substance such as: procedures for handling or working with the substance, physical data, first aid guidance, health effects, reactivity, storage requirements, disposal guidelines, proper protective equipment, and spill-handling procedures.	AC				AC = After sheets are updated or hazardous chemical no longer stored by agency, as applicable.		Previously 5B.014	
GEN.072	5.4.013	Disaster Preparedness and Recovery Plans	Includes Continuity of Operations Plan (COOP), Business Continuity Plan (BCP), Agency and Division Disaster Recovery Plans, document strategies, personnel procedures, and any other resources used to respond to short/long term interruptions to essential services. Might contain confidential personnel contact information.	US						Previously 2.029, 3A.015, 4.051, 5A.015 CONFIDENTIAL AND VITAL RECORD	Labor Code §412.054 TAC, Title 1, Part 10, Chapter 202, Subchapter B, Rule §202.24



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GEN.073	5.5.002	Long Distance Telephone Logs	Long distance logs created by agencies for internal documentation purposes. Includes any similar logs created for long distance faxes or electronic transmissions.	AV						Previously 5.026, 8.066	
GEN.074	1.1	Event Planning Records	Working papers, records of attendance, individual evaluation sheets, cost sheets, billing statements, memos, copies of contracts, correspondence, and all other supporting documentation for events held by TSLAC including conferences, Genealogy After Dark, TSLAC Author Speaker Series, Texas Reading Club Kickoff, and other educational or promotional events that are hosted by TSLAC.	AC	3			AC = Contract completed or all work for event completed.		CAUTION: Do not confuse this record series with training materials created by TSLAC staff to train internal employees or external entities it regulates or serves. SEE Agency Item Number GEN.018 and GEN.051.	





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GEN.075	5.3	Division Purchasing/Financial Databases and Files	Division copies of Purchase Initialization Form (PIFs), Purchase Request Form (PRFs), receiving reports, packing slips, related correspondence, or other documents related to a purchase that are entered into a division purchasing or financial database, or scanned to Portable Document Format (PDF) to track item codes, PIF/PRF dates, approval dates, etc.	FE	3					CAUTION: SEE Agency Item Number 1G.016 for agency copies of all purchasing documents. Be careful not to hold Division Purchasing Database, other financial databases, or associated files longer than the retention assigned to 1G.016. SEE ALSO Section 1B for all agency financial documentation, reports, and databases.	
GEN.076	5.4	Incident Reports	These files document patrons who have received notice of disciplinary action or prohibitory sanctions. They consist of incident forms completed by the Texas State Library and Archives Commission (TSLAC) staff about the incident, letters sent to patrons describing the unacceptable activity and the prohibitions on patron privileges, and correspondence with public safety or patron guardians.	AV						CAUTION: Documentation on patrons with an ongoing history of incidents or patrons that have been banned from the facility by TSLAC or the Department of Public Safety (DPS) may need to be maintained longer	



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GEN.077	1.1	Awards - Eligibility and Award History Information	Records that document selection criteria and the history of awards both administered by the Texas State Library and Archives Commission (TSLAC) or applied for on behalf of TSLAC. Including, but not limited to the following: eligibility terms and selection criteria, award history and information on funding sources, award notifications, summary lists of winners, biographies on winners, and press releases. Includes Network Library of the Year Award and Records Management Program Awards administered to Local Governments.	PM						CAUTION: For Employee of the Quarter (EOQ) Awards, SEE Agency Item Number 8.053.	



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GEN.078	1.1	Awards - Selection Records	Records that document the process of selecting award winners of awards both administered by the Texas State Library and Archives Commission (TSLAC) and applied for on behalf of TSLAC. Including, but not limited to the following: applications, nomination letters, recommendations, letters of award notification or denial, letters accepting or declining awards, demonstration of need documentation, and any other related documentation and correspondence. Includes Network Library of the Year Award and Records Management Program Awards administered to Local Governments.	FE	1					CAUTION: For Employee of the Quarter (EOQ) Awards, SEE Agency Item Number 8.053.	



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GEN.079	1.1	Training Course Development Files and Planning Records	Files created during the planning and development of internal and external course training sessions. Including, but not limited to the following: course outlines, reference materials and class research, course justifications, course development correspondence, approval or denial for class creation, invitations to selected guests for pilot classes, feedback, and any other files related to the course development process.	AC	1			AC = Course obsolete, superseded, or administrative value has been met, as applicable.			
GEN.080	1.1	Miscellaneous Presentation and Training Records	Miscellaneous one-time presentations or training sessions held by the Texas State Library and Archives Commission (TSLAC) employees for internal and external purposes. Includes presentation slides, handouts, notes, scripts, and other supporting materials.	AC	5			AC = Date of training.		CAUTION: If the training is paid for by federal LSTA funds, SEE Agency Item Number 4.055.	
GEN.081	1.1	Supplemental Training Program Records	Materials provided to training attendees for their convenience: welcome letter, list of lunch destinations, maps, etc.	US							



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GEN.082	1.1	Training and Workshop Administration Records	Includes registration, class rosters, class evaluations, schedules/agendas, sign-in sheets, and other records that document the administration of training or workshop classes developed by the Texas State Library and Archives Commission (TSLAC) and offered for internal employees and external individuals we regulate or serve.	FE	2					CAUTION: Do not confuse this record series with training administration records for Library Development and Networking (LDN) or SLRM that have different retention requirements. SEE Agency Item Number 4.006 and 5C.201.	
GEN.083	1.1	Appointments	Includes letters appointing individuals to serve on advisory boards and committees.	AC	3			AC = End of appointment or end of term on board or committee.			
GEN.084	5.2.003	Building Plans and Specifications - Leased	Includes architectural and engineering drawings, profiles, and blueprints.	AC	2			AC = Termination or cancellation of lease.		SEE ALSO Agency Item Numbers GEN.064 and 8.075. Previously 3B.013, 5B.001, 8.058, GEN.065 VITAL RECORD	