Texas State Library and Archives Commission

*General Informat* 512-454-2705 • *Fax* 512-323-6100 • *rds Center Services* 512-454-2751
*Micrographics and Imaging Services* 512-454-2705 • *Records Management Assistance* 512-452-9242

State and Local Records Management

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

4400 Shoal Creek Blvd.
Austin, Texas
78756

www.tsl.state.tx.us

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*Assistant State Librarian*
Edward Seidenberg

*Making information work for all Texans*

June 3, 2004

Dr. Len Cleary
Secretary/Treasurer
State Anatomical Board
P. O. Box 20745
Houston, TX 77030-0745

Dear Dr. Cleary:

Enclosed is a copy of your recertified records retention schedule. Please ensure all old copies of the schedule are superseded with this recertified copy.

Your recertified 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. We urge on you the importance of disposing of the records of your agency in a timely manner in accordance with the retention periods on your schedule. The destruction of any records of your agency not on your schedule requires special authorization from us.

During a certification period, state regulations (13 TAC §6.4) also require 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, consult the Texas State Records Management Manual or the government information analyst assigned to your agency.

Your efforts in maintaining an up-to-date 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. Your schedule will be due for recertification on the last working day of May 2006. If you have any questions, call the information analyst assigned to your agency, Steve Drake, at (512) 452-9242, ext. 155.

Sincerely,

Michael Heskett
Director and State Records Administrator

Enclosure
cc: State Auditor, State Archivist
cc: (without enclosure) Vick Williams

R01-528

# STATE OF TEXAS – RECORDS RETENTION SCHEDULE
## CERTIFICATION AND APPROVAL

**Section 1 USE OF FORM** (Check One, See Reverse)

Original Submission – Form SLR 105

X Recertification of Existing Schedule

Replacing Pages of Approved Schedule
(Complete Section 4 and attach pages)

Adding Records Series to Approved Schedule
(Pages attached)

**Section 2 AGENCY CERTIFICATION** (See Reverse)

Agency Code 528 Agency Anatomical Board of the State of Texas

*I hereby certify that the attached Records retention Schedule was prepared in accordance with Chapter 441, Subchapter K, Texas Government Code, and that the administrative rules for electronic records, adopted under §441.189, will be followed for records subject to the rules*

(Check one) Agency Head X Designated Records Management Officer

Name (Print or Type) Len Cleary, Ph.D.

Signature _____ Date March 10, 2004

**Section 3 APPROVALS**

State Auditor's Office

Name (Print or Type) Laura Taylor-Woods

Signature _____ Date 5-21-04

Texas State Library & Archives Commission

Name (Print or Type) Peggy D. Rudd

Signature Peggy D. Rudd Date 5/31/04

**Section 4 CHANGES TO RECORDS SERIES** (Complete only if replacing pages of an existing retention schedule) Attach additional sheet if necessary

| Records Series Item Number | Agency Item Number | Records Series Title | Describe Change (e.g., change in record medium, retention period, agency item number, etc.) |
|---|---|---|---|
| | | | |
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APPROVED MAY 31 2004

# CAUTION

A state record may not be destroyed if any litigation, claim, negotiation, audit, open records request, administrative review, or other action involving the record is initiated before the expiration of a retention period for the record set by the commission or in the approved records retention schedule of the agency until the completion of the action and the resolution of all issues that arise from it, or until the expiration of the retention period, whichever is later.

Section 441.187(b), Government Code

APPROVED MAY 31 2004

SLR 105 (3/93)
(Replaces RMD 105)
Texas State Library
State and Local Records
Management Division

# STATE OF TEXAS
# RECORDS RETENTION SCHEDULE

Official Approval Date

1. Page 1 of 5
Form RMD 105C MUST accompany all submissions of this form
Indicate Use of Form
- ☐ Original Submission
- ☒ Recertification
- ☐ Replacement page
- ☐ Addendum Page

2. AGENCY CODE: 528 | 3. AGENCY: Anatomical Board of the State of Texas

Anatomical Board Of The State Of Texas

| 4. RECORDS SERIES ITEM NUMBER | 5. AGENCY ITEM NUMBER | 6. RECORDS SERIES TITLE | 7. RETENTION PERIOD AGENCY | STORAGE | TOTAL | 8. SECURITY | 9. ARCHIVAL | 10. MEDIUM | 11. VITAL | 12. REMARKS |
|---|---|---|---|---|---|---|---|---|---|---|
| 1.1.002 | 1 | Audits - External Audit Reports | AC+3 | 0 | AC+3 | O | | P | | AC = Publication or release of final audit findings. The record copy of any audit performed by the state auditor's office is retained permanently by that agency. |
| 1.1.006 | 2 | Complaint Records<br>Complaints received by the agency from the public concerning the agency and records pertaining to the resolution of the complaint. | AC+2 | 0 | AC+2 | O | | P | | 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 item number 1.1.048 (litigation files). |
| 1.1.007 | 3 | Correspondence - Administrative<br>Incoming/Outgoing and internal correspondence, in any format, pertaining to the formulation, planning, implementation, interpretation, modification, or redefinition of the programs, services, or projects of a component and the administratitive regulations, policies, and procedures that govern them. | 3 | 0 | 3 | O | R | P | X | CAUTION: This records series and item number 1.1.008 should be used only for correspondence that is not included in or directly related to another records series in this schedule. For example, a memorandum that documents an appropriations request must be retained for the minimum retention period prescribed by item number 1.1.004; a letter concerning an audit for that prescribed by item number 1.1.002, etc. See also item number 1.1.011. |
| 1.1.008 | 4 | Correspondence - General<br>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. | 1 | 0 | 1 | O | | P | | See comment on item number 1.1.007 (correspondence - administrative). See also item number 1.1.010 (directives). |
| 1.1.014 | 5 | Legal Opinions and Advice<br>From agency legal counsel or the Attorney General, including any request eliciting the opinions. | AV | 0 | AV | O | R | P | | CAUTION: Does not include legal opinions or advice rendered on a matter in litigation or with regard to pending litigation. See item number 1.1.048. |

RETENTION CODES (For Field 7)
- AC — After Close, Termination, Completion, Expiration, Settled
- CE — Calendar Year End
- AV — As Long as Administratively Valuable
- FE — Fiscal Year End
- LA — Life of Asset
- PM — Permanent
- US — Until Superseded

MEDIUM CODES (For Field 10)
- P — Paper
- M — Microfilm
- C — Computer Print-out
- E — Electronic
- O — Other (Specify in Field 12)

ARCHIVAL CODES (For Field 9)
- A — Retain in Archives
- R — Review Required Before disposal

SECURITY CODES (For Field 8)
- O — Open Record
- C — Confidential Record

VITAL CODE (For Field 11)
Indicate with an "X"

APPROVED MAY 31 2004

SLR 105 (3/93)
(Replaces RMD 105)
Texas State Library
State and Local Records
Management Division

# STATE OF TEXAS
# RECORDS RETENTION SCHEDULE

Official Approval Date

1. Page 2 of 5

Form RMD 105C MUST accompany all submissions of this form
Indicate Use of Form

- ☐ Original Submission
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- ☐ Addendum Page

2. AGENCY CODE: 528 | 3. AGENCY: Anatomical Board of the State of Texas

Anatomical Board Of The State Of Texas

| 4. RECORDS SERIES ITEM NUMBER | 5. AGENCY ITEM NUMBER | 6. RECORDS SERIES TITLE | 7. RETENTION PERIOD AGENCY | STORAGE | TOTAL | 8. SECURITY | 9. ARCHIVAL | 10. MEDIUM | 11. VITAL | 12. REMARKS |
|---|---|---|---|---|---|---|---|---|---|---|
| 1.1.057 | 6 | Transitory Information<br>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 on-going records series. Transitory records are not essential to the fulfillment of statutory obligations or to the documentation of agency functions. Examples of transitory information are routine messages (can be recorded on any medium, such as hard copy message slips or in an electronic format on e-mail and voice mail); 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 | 0 | AC | O | | O | | 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 sign-offs (1.2.001) or in records disposition logs (1.2.010), but agencies should establish procedures governing disposal of these records as part of its records management plan (1.2.014). |
| 1.1.058 | 7 | Meeting Agenda and Minutes<br>Official agenda and minutes of state boards, committees, commissions, and councils that conduct open meetings as required by Government Code, Chapter 551. | PM | 0 | PM | O | I | O | | Agency retains permanent record copy. The archival requirement will be met by sending a copy to the archives and information services division, Texas State Library and Archives Commission. CAUTION: This records series and item numbers 1.1.059, 1.1.060, 1.1.061, and 1.1.062 must be used for those state boards, committees, commissions, and councils, which by law or the Biennial Apprpropriations 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. |

RETENTION CODES (For Field 7)
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- US — Until Superseded

MEDIUM CODES (For Field 10)
- P — Paper
- M — Microfilm
- C — Computer Print-out
- E — Electronic
- O — Other (Specify in Field 12)

ARCHIVAL CODES (For Field 9)
- A — Retain in Archives
- R — Review Required Before disposal

SECURITY CODES (For Field 8)
- O — Open Record
- C — Confidential Record

VITAL CODE (For Field 11)
Indicate with an "X"

APPROVED MAY 31 2004

SLR 105 (3/93)
(Replaces RMD 105)
Texas State Library
State and Local Records
Management Division

# STATE OF TEXAS
# RECORDS RETENTION SCHEDULE

Official Approval Date

1. Page 3 of 5
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Indicate Use of Form
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2. AGENCY CODE: 528 | 3. AGENCY: Anatomical Board of the State of Texas

Anatomical Board Of The State Of Texas

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|---|---|---|---|---|---|---|---|---|---|---|
| 1.2.005 | 8 | Records Retention Schedule (SLR 105)<br>Agency copy. Formerly RMD 105. Includes documentation of certification and approval - forms SLR 105C (formerly RMD 105C) and/or SLR 115. | US | 0 | US | O | | P | | Original is retained permanently by the State and Local Records Management Division, Texas State Library and Archives Commission. |
| 1.2.010 | 9 | Records Disposition Logs<br>Logs or similar records listing records destroyed or transferred to the Archives and Information Services Division, Texas State Library and Archives Commission, showing records series title, dates of records, and date destroyed or transferred. | 20 | 0 | 20 | O | | P | | |
| 3.1.035 | 10 | Performance Bonds<br>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+4 | 0 | AC+4 | O | | P | X | AC = Expiration or termination of the bond according to its terms. CAUTION: Does not include construction or architectural surety bonds. See item number 5.2.028. |
| 3.3.023 | 11 | Reimbursable Activities<br>Requests and Authorization to Engage in Requests and authorizations for travel; participation in educational programs, workshops, or college classes; or for other work-related activities for which the expenses of the employee are defrayed or reimbursed. | FE+3 | 0 | FE+3 | O | | P | | |
| 4.1.001 | 12 | Accounts Payable Information | FE+7 | 0 | FE+7 | O | | P | | Agency Policy Based on Federal Office of Management and Budget (OMB) Circular A-21. |
| 4.1.002 | 13 | Billing Detail<br>Provides itemized billing record for services rendered. | FE+7 | 0 | FE+7 | O | | P | | Agency Policy Based on Federal Office of Management and Budget (OMB) Circular A-21. |
| 4.2.005 | 14 | Purchase Vouchers<br>Requisitions, orders, receiving reports, invoices, or statements, change orders, etc. | FE+7 | 0 | FE+7 | O | | P | | Agency Policy Based on Federal Office of Management and Budget (OMB) Circular A-21. |
| 4.2.006 | 15 | General Journal Vouchers | FE+7 | 0 | FE+7 | O | | P | | Agency Policy Based on Federal Office of Management and Budget (OMB) Circular A-21. |

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APPROVED MAY 31 2004

SLR 105 (3/93)
(Replaces RMD 105)
Texas State Library
State and Local Records
Management Division

# STATE OF TEXAS
# RECORDS RETENTION SCHEDULE

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1. Page 4 of 5
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|---|---|---|---|---|---|---|---|---|---|---|
| 4.4.001 | 16 | General and Subsidiary Ledgers | FE+7 | 0 | FE+7 | O | | P | X | Agency Policy Based on Federal Office of Management and Budget (OMB) Circular A-21. |
| 4.4.002 | 17 | Accounts Receivable Ledgers | FE+7 | 0 | FE+7 | O | | P | X | Agency Policy Based on Federal Office of Management and Budget (OMB) Circular A-21. |
| 4.4.003 | 18 | Accounts Payable Ledgers | FE+7 | 0 | FE+7 | O | | P | | Agency Policy Based on Federal Office of Management and Budget (OMB) Circular A-21. |
| 4.5.003 | 19 | Annual Financial Reports<br>Required by the General Appropriations Act (100 Day Report). | PM | 0 | PM | O | | P | | Agency Policy. |
| 4.6.001 | 20 | Balancing Records | FE+7 | 0 | FE+7 | O | | P | | Agency Policy Based on Federal Office of Management and Budget (OMB) Circular A-21. |
| 4.6.002 | 21 | Reconciliations | FE+7 | 0 | FE+7 | O | | P | | Agency Policy Based on Federal Office of Management and Budget (OMB) Circular A-21. |
| 4.6.003 | 22 | Cash Counts | FE+3 | 0 | FE+3 | O | | P | | |
| 5.1.004 | 23 | Mail and Telecommunications Listings<br>Any mailing address, telephone or fax number, or e-mail address records maintained by an agency on its employees or on entities or persons it serves. | US | 0 | US | O | | P | | |
| 5.1.005 | 24 | Postage Records<br>Records and reports of postage expenses, including postal meter usage. | FE+3 | 0 | FE+3 | O | | P | | |
| 5.1.012 | 25 | Charge Schedules/Price Lists<br>Schedules of prices charged by an agency for services to the public or other agencies, including any documentation used to determine the changes. | US+7 | 0 | US+7 | O | | P | | Agency Policy Based on Federal Office of Management and Budget (OMB) Circular A-21. |
| 5.2.014 | 26 | Inventory - Annual Physical<br>Property, equipment, supply verification. | FE+3 | 0 | FE+3 | O | | P | | |

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# STATE OF TEXAS
# RECORDS RETENTION SCHEDULE

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1. Page 5 of 5

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2. AGENCY CODE: 528

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|---|---|---|---|---|---|---|---|---|---|---|
| 5.5.002 | 27 | Long Distance Telephone Logs<br>Long distance logs created by agencies for internal documentation purposes. Includes any similar logs created for long distance facsimile or electronic transmissions. | AV | 0 | AV | O | | P | | Agency Policy Based on Federal Office of Management and Budget (OMB) Circular A-21. |
| | 28 | Donor Records - Anatomical Forms<br>This record series consists of completed bequeathal forms and cadaver information for people who have donated their bodies. | PM | 0 | PM | C | A | P | X | |

RETENTION CODES (For Field 7)

- A C — After Close, Termination, Completion, Expiration, Settled
- CE — Calendar Year End
- A V — As Long as Administratively Valuable
- FE — Fiscal Year End
- L A — Life of Asset
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