

October 5, 2018



Jerry Sorrells
Coordinator, Records Administration
Texas State Technical College System
501 Campus Dr
Waco, TX 76705

Re: Agency records retention schedule amendment approved for use.

Dear Mr. Sorrells:

Amendment 1 to your agency's 10 recertification of your records retention schedule is approved for use as of October 2, 2018. Your currently approved records retention schedule and all amendments are available on our website at <https://www.tsl.texas.gov/slrn/state/schedules.html>. Please maintain this amendment with your currently approved schedule so that it can be easily referenced.

We appreciate your efforts in maintaining an up-to-date schedule. Making additions and changes to your schedule as you identify them not only ensures the integrity of your recordkeeping practices, but keeps your agency in compliance with state regulations (13 TAC §6.4) requiring the submission of any needed amendments to a retention schedule during its certification period to keep the information in the schedule current.

We will notify you of the date your schedule is due for recertification. Any additional approved amendments to your schedule, such as this one, should be incorporated into your main retention schedule prior to submitting it for recertification.

Thank you again for your commitment to complying with state records management laws and regulations. If we can provide any assistance to you, please contact the Government Information Analyst assigned to your agency, Joshua Clark at 512-936-0270 or jclark@tsl.texas.gov.

Sincerely,

A handwritten signature in black ink, appearing to read "CK" or "Kelso".

Craig Kelso
Director and State Records Administrator

cc: Agency head

Lorenzo de Zavala
State Archives and
Library Building

1201 Brazos Street
Austin, Texas
78701

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

www.tsl.texas.gov

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Michael C. Waters

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Director and Librarian
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Assistant State Librarian
Gloria Meraz

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 719
Agency Name Texas State Technical College (TSTC)

(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
Name (Print or type) JERRY W. SORRELLS
Date 21 Sep 18

Section 2. Approvals

(Submitting agencies do not write in this section)

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

Signature _____
Name (Print or type) _____
Date _____

Not Required at This Time

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

Signature
Name (Print or type) Gloria Meraz
Date 10/2/18

Cert/Recert No. 10 Amendment No. 1

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 122
 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: 719		2. Agency Name: Texas State Technical College											
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	13. N, C, O	14. Current AIN
					Years	Months	Days						
AC03.000	5.1.001	Lease, Contracts, and Agreements	Including general obligation, land lease, utilities, and construction except for buildings. Documentation include specifications, affidavits of publication of calls for bids, accepted bids, performance bonds, contracts, purchase orders, inspection reports, and correspondence. Memorandums of Understandings, Partnerships, Intellectual Property. Transfer Credit Between Texas State Technical College and Other Colleges (Agreement between TSTC and another college).	AC	7			Expiration or termination of the instrument according to its terms.		All Audit Requirements are Met Prior to Final Disposal.	Government Code, 441.1855	C	AC03.000



STATE OF TEXAS
Records Retention Schedule

SLR 122
 Rev. 2017-07

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					Years	Months	Days						
AF01.001	1.1.004	Legislative Appropriations Request	Includes any supporting documentation created and/or used to justify and support legislative appropriations request by an agency. Instructions for Preparing, Working Papers (Preliminary), Biennial Operating Plan/ Supporting Documentation, and Emergency Submission.	AC	6			September 1 of odd-numbered Calendar years.	A	The archival requirement is met by sending the required copies of the requests to the Texas State Publications Depository Program, Texas State Library and Archives Commission. Only copies of supporting documents submitted to the Legislative Budget Board are archival.		C	AF01.001



STATE OF TEXAS
Records Retention Schedule

SLR 122
 Rev. 2017-07

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1. Agency Code: 719			2. Agency Name: Texas State Technical College										
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	13. N, C, O	14. Current AIN
					Years	Months	Days						
AF11.006	4.7.008	Grant Records	Includes Federal, State and Local grants. Grant Contracts and Grant Reports.	AC	7			Satisfaction of all Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Government (the Common Rule).		Caution: Retention requirements may vary depending on the specific federal, state, or local funding agency. Agencies must ensure that records are retained for the appropriate retention period as required by the grant funding agency or default to RRS retention period.		C	AF11.006
AS03.000		Counseling Regulations Records	Vocational (Degree Plan), graduation, requirements for federal/state, Disease/drug education, personal life, insurance and wellness/fitness program.	AC	3			Termination of program, rules, policies, or procedures.	R			C	AS03.000



June 4, 2014

Mr. Jerry Sorrells
Coordinator, Records Administration
Texas State Technical College System
3801 Campus Dr.
Waco, TX 76705

RE: Agency records retention schedule approved for use

Dear Mr. Sorrells:

Your agency's records retention schedule is approved for use as of June 2, 2014. Your currently approved records retention schedule is available on our website at <https://www.tsl.state.tx.us/slrn/state/schedules.html>. Please ensure all old copies of the schedule are superseded with this recertified copy.

Your approved retention schedule provides you with continuing authorization to dispose of agency records according to its terms. Please note that state regulations (13 TAC §6.8) require documentation of the final disposition of records by your agency. This requirement may be met by maintaining a disposition log or other evidence of the records series titles, dates covered, volume, and date of disposition. 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.

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 triennially thereafter. The deadline for submission of your schedule for its next recertification is the last working day of **June 2017**.

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, Bret Adams, at 512-936-0270 or badams@tsl.texas.gov.

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

Sincerely,

Craig Kelso
Director and State Records Administrator

cc: State Auditor, State Archivist, Michael L. Reeser

State and Local
Records Management

P.O. Box 12927
Austin, Texas
78711.2927

4400 Shoal Creek Blvd.
Austin, Texas
78756

www.tsl.texas.gov

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Director and Librarian
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Assistant State Librarian
Edward Seidenberg

*Preserving yesterday,
informing today,
inspiring tomorrow.*

R01.719/719



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 719
 Agency Name TEXAS STATE TECHNICAL COLLEGE SYSTEM

(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 *Jerry W Sorrells*
 Name (Print or type) JERRY W SORRELLS
 Date 3/21/14

Section 2. Approvals

(Submitting agencies do not write in this section)

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

Signature _____
 Name (Print or type) _____
 Date _____

Not Required at This Time

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

Signature *E. Hidenberg*
 Name (Print or type) _____
 Date 06-02-2014

Cert/Recert No. 10 Amendment No. _____

CAUTION

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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 1 of 101

2. Agency Code 719		3. Agency Name Texas State Technical College System							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

ADMINISTRATION									
	AA01.001	Charters	PM		PM	R			
	AA01.002	Board Member Data	AC+3		AC+3	R	AC = After term expires.		
	AA01.003	Bylaws	US+3		US+3	R			
	AA01.004	Minute Order Index	PM		PM	A			
1.1.058	AA01.005	Board Meeting Agenda and Minutes <i>Includes Agendas & Supporting Materials, Minutes, Committee Minutes Official agenda and minutes of state boards, committees, commissions, and councils that conduct open meetings as required by Government Code, Chapter 551. Only Meeting Minutes are vital records.</i>	PM		PM	A	Gov. Code, Chapter 551 Required copies sent to the Archives and Information Services Division, TSLAC.		

Retention Codes (Field 7)						Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives					
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist					



STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 2 of 101

2. Agency Code 719		3. Agency Name Texas State Technical College System							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				
1.1.026	AA01.006	Texas Register Submissions <i>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.</i>	AC+1		AC+1		AC = Date of Publication in the Texas Register		
1.1.059	AA01.010	Board Closed Meetings-Certified Agendas or Tape Recordings <i>Certified agenda or tape recordings of closed meetings or state boards, commissions, committees, and councils.</i>	AC+2		AC+2		AC=The date of the meeting or completion of pending action involving the meeting, whichever is later. Government Code, 551.104(a)		
	AA01.011	Certification of Resolutions	1		1				

Retention Codes (Field 7)				Archival Codes (Field 8)	
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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 3 of 101

2. Agency Code 719		3. Agency Name Texas State Technical College System						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total			

1.1.062	AA02.001	TSTC Administrative Councils Meetings- Agenda and Minutes <i>Supporting Documentation- Includes documents sent in advance of meetings for briefing purposes, some of which may not be submitted at an actual meeting. Documents submitted at meetings of state boards, commissions, committees, and councils including exhibit items, documentation for agenda items, etc. Agenda & Minutes of :Management Council, TSTC Leadership Alliance, Executive Cabinet, College Administrative Council, etc.</i>	2		2	A		
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Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
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STATE OF TEXAS

Records Retention Schedule

SLR 105

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1. Page 4 of 101

2. Agency Code 719		3. Agency Name Texas State Technical College System							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				
5.4.012	AA03.000	Security Access Records <i>Records relating to the issuance of keys, identification cards, building passes passwords, signed statements or similar instruments of access to agency facilities, equipment or automated systems. Key requests. Colleague Access, Image Now Access</i>	AC+2		AC+2		AC = Until superseded, date of expiration, or date of termination, whichever sooner.		

Retention Codes (Field 7)						Archival Codes (Field 8)	
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 5 of 101

2. Agency Code 719		3. Agency Name Texas State Technical College System						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival 9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total			

1.1.007	AA04.001	Executive Correspondence <i>Incoming/outgoing and internal correspondence pertaining to the formulation, planning, implementation, interpretation, modification, redefinition of the programs, services, or projects of an agency and the administrative regulations, policies, and procedures that govern them.</i> <i>Board of Regents-Correspondence</i> <i>Federal/National/State Correspondence</i>	4		4	R	ARCHIVE NOTE: Only the administrative correspondence of executive staff, board members, division directors and program heads require archival review. Contact the TSTC Archives when these records have met their retention periods. CAUTION: This agency item number should be used only for correspondence that is not included in or directly related to another records series on this schedule. For example, a memorandum that documents an appropriations request must be retained for the minimum retention period prescribed by Records Series item number 1.1.004; a letter concerning an audit for that prescribed by item number 1.1.002		
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Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 6 of 101

2. Agency Code 719		3. Agency Name Texas State Technical College System						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival 9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total			

1.1.008	AA05.000	<p>General Correspondence</p> <p><i>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. Includes: Datatec/Colleague correspondence and Colleague Users Group, Department of Information Resources, State Auditor (General Correspondence), Texas Innovation Network System (TINS) general Correspondence, Educational Institutions (out of State, State or Private Universities) correspondence, City Government general correspondence.</i></p>	2		2	<p>CAUTION: This agency item number should be used only for correspondence that is not included in or directly related to another records series on 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.</p> <p><i>SEE ALSO item number 1.1.010</i></p>		
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Retention Codes (Field 7)				Archival Codes (Field 8)	
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives	
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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 7 of 101

2. Agency Code 719		3. Agency Name Texas State Technical College System								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total					

1.1.006	AA06.000	Complaint Files <i>(Employee, student, etc.) Complaints received by an agency from the public concerning the agency and records pertaining to the resolution of the complaint.</i>	AC+2		AC+2		AC = Final disposition of the complaint. CAUTION: If a complaint becomes the subject of litigation, it must be included in and is subject to the minimum retention period of item number 1.1.048.		
1.1.070	AA07.001	Rules, Operating Standards, and Compliance – Final <i>Includes: College Operating Procedure, Employee Holiday Schedule and Employee Due Process Procedures at TSTC Manuals, guidelines, administrative rules, or similar records distributed internally for</i>	AC+3		AC+3	R	AC = Until superseded or termination of rules, policies or procedures. <i>SEE: 1.1.071</i>		

Retention Codes (Field 7)						Archival Codes (Field 8)			
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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 8 of 101

2. Agency Code 719		3. Agency Name Texas State Technical College System						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total	9. Remarks		

		<p><i>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.</i></p> <p><i>Human Resource: Internal Vacancies Procedure, Faculty-Staff Handbook Information. S.3.b</i></p> <p><i>Educational Services:</i></p> <p><i>Student Admissions and Placement ; Recruitment, Eligibility, Testing, Articulation, College Procedures, Student Registration; College Procedures, Add/drop, Class Schedules, Course Information, Faculty Information, Registration Process, End of Term Process, Grades/Transcripts process</i></p> <p><i>Faculty Advising Handbook</i></p> <p><i>TSTC Records Management Manual</i></p>						
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Retention Codes (Field 7)				Archival Codes (Field 8)	
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STATE OF TEXAS

Records Retention Schedule

SLR 105

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1. Page 9 of 101

2. Agency Code 719		3. Agency Name Texas State Technical College System								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total					

1.1.071	AA07.003	Rules, Operating Standards, Policies, and Procedures- Working Files <i>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.</i>	AC+3		AC+3	R	AC = Completion of final program, rules, policies or procedures.		
1.1.011	AA07.004	Executive Orders <i>Any document that initiates, rescinds, or amends a regulation, policy, or procedure that governs the programs, services, or projects of an agency.</i>	US+3		US+3	A			

Retention Codes (Field 7)				Archival Codes (Field 8)			
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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 10 of 101

2. Agency Code 719		3. Agency Name Texas State Technical College System								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total					

1.1.056	AA07.005	ADA (Americans with Disabilities Act) Documentation <i>Self-evaluations and plans documenting compliance with the requirements of the Americans with Disabilities Act.</i>	3		3		28 CFR 35.105(c).		
1.1.043	AA08.001	Employee Training Materials <i>Instructional materials developed by an agency for training entities or individuals it regulates or serves. Records Management Training Materials-Internal/External</i>	US+1		US+1				
1.1.075	AA08.002	Alternative Dispute-Final Agreement <i>(Mediation) Final agreement described by Government</i>	AC+5		AC+5		AC = Date of final agreement, Texas Civil Practice and Remedies Code, Chapter 154.071.		

Retention Codes (Field 7)				Archival Codes (Field 8)			
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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 11 of 101

2. Agency Code 719		3. Agency Name Texas State Technical College System							
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			Agency	Storage	Total				

		<i>Code, 2009.054(c), associated with a matter conducted under an alternative dispute resolution procedure in which personnel of a state agency participated as a party on the agency's behalf. S.3.d</i>							
1.1.010	AA09.005	Directives <i>Any item that officially initiates, rescinds or amends general office procedures.</i>	US+1		US+1				
5.1.014	AA09.006	Office Procedures <i>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.</i>	US+1		US+1				

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STATE OF TEXAS

Records Retention Schedule

SLR 105

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1. Page 12 of 101

2. Agency Code 719		3. Agency Name Texas State Technical College System								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total					

1.1.055	AA10.001	TSTC and State Strategic Plans <i>Information resources and operational strategic Plans prepared in accordance with 2054.095 and 2056.002, Government Code.</i>	PM		PM	A	Permanent Record Copy Retained in Records Center. Required Copies sent to Texas State Publications Depository, TSLAC.		
1.1.024	AA10.002	Plans and Planning Records <i>Mid-Range, Long Range Planning, Outside Advisory Committee and/or Task Force planning, and Potential Colleges & Extension Centers Plans and records relating to the process or 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. Includes: Colleague Program Planning & Development Master Plan Certification Facilities- Master Plans</i>	AC+3		AC+3	R	AC = Decision made to implement or not to implement result of planning process.		

Retention Codes (Field 7)						Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives					
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist					



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Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 719		3. Agency Name Texas State Technical College System								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total					

1.1.023	AA11.000	TSTC Organizational Chart	US		US	A	Agency Copy		
1.1.067	AA12.001	<p>Reports and Studies (Non-Fiscal) Internal and External</p> <p><i>Annual, sub-annual, or special reports or studies on non-fiscal aspects of an agency's programs, services, or projects compiled by agency personnel, by advisory committees, or by consultants under contract with an agency that are not noted elsewhere in this schedule. Includes reports distributed either internally or to other entities.</i></p> <p><i>Includes: Financial Services-Non Financial Report</i></p> <p><i>TSTC System Customer Service Report, Educational Services-Program Evaluations (Special Reports and Evaluations of Instructional Programs), Pre-Tech Studies, Instructional Reports-External (by agency name)/Internal (by department name),</i></p>	3		3	R			

Retention Codes (Field 7)						Archival Codes (Field 8)				
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives		AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist



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Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 719		3. Agency Name Texas State Technical College System							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

		<i>Enrollment Forecast Report (this is a report used to get an idea of future year's enrollment)</i> <i>Human Resources – Quarterly FTE Reports</i>							
1.1.065	AA12.002	Reports Studies (Non-Fiscal)-Raw Data <i>Information or data collected and compiled for the purpose of producing non-fiscal reports.</i>	AV		AV				
1.1.069	AA12.003	Reports (Activity) <i>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.</i>	1		1		CAUTION: See item number 1.1.064		

Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
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SLR 105

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2. Agency Code 719		3. Agency Name Texas State Technical College System								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total					

1.1.064	AA12.004	Performance Measures Documentation <i>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.</i>	FE+3		FE+3		CAUTION: The FE+3 retention period overrides any shorter retention period for a records series in this schedule if the records series is needed for documentation of agency performance measures.		
1.1.068	AA12.005	Performance Measures Reporting <i>Reports on agency performance measures submitted to executive and legislative offices.</i>	AC+10		AC+10		AC = September 1 of odd-numbered calendar years.		
1.1.040	AA13.000	Speeches, Papers & Presentations <i>Notes or text of speeches, papers, presentations, or reports delivered in conjunction with agency work.</i>	AC		AC	R	AC = End of term in office or termination of service in a state position.		

Retention Codes (Field 7)						Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives					
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist					



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Records Retention Schedule

SLR 105

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2. Agency Code 719		3. Agency Name Texas State Technical College System								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total					

1.1.013	AA14.000	Calendars-Appointments-Itineraries <i>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.</i>	CE+1		CE+1	R	ARCHIVE NOTE: Only the calendars, appointment, and itinerary records of elected officials, executive staff, board or commission members, division directors, and program heads require archival review. <i>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.</i>		
	AA15.000	History of Institution	AV		AV	A			
	AA15.001	Mission & Goal Statement	US		US	A	<i>(Required copies sent to Texas State Publications Depository, TSLAC.)</i>		
	AA15.002	Special Events	AV		AV	A			

Retention Codes (Field 7)						Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives					
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist					



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SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 719		3. Agency Name Texas State Technical College System						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total			

	AA15.003	Trademark, Seal, Logo for TSTC <i>Including a symbol of an organization such as a mascot.</i>	AV		AV	A		
1.1.063	AA16.001	Staff Meetings-Internal/External <i>Minutes or notes, and supporting documentation taken at internal or external agency staff meetings. Includes: (Colleague User Group) meetings Corporate College-TSTC Meetings Educational Services-Meetings (Alpha), Curriculum Coordinators Meetings, Curriculum & Instructional Practices Meetings</i>	1		1			

Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist			



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SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 719		3. Agency Name Texas State Technical College System							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				
1.1.060	AA16.002	Open Meeting- Audio or Video Tape <i>Audio or video tapes of open meetings of state boards, commissions, committees, and councils.</i>	AC+1		AC+1		AC=Approval of the formal written minutes. <i>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 item number 1.1.058.</i>		
1.1.061	AA16.003	Meeting Notes Notes taken during open meeting of state boards, commissions, committees, and councils from which written minutes are prepared.	AC+90 days		AC+90 days		AC=Approval of the formal written minutes. <i>SEE caution comment at item number 1.1.058</i>		

Retention Codes (Field 7)						Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives					
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist					



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2. Agency Code 719		3. Agency Name Texas State Technical College System						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total			

1.1.057	AA19.000	<p>Transitory Information</p> <p><i>Records of temporary usefulness that are not an integral part of a records series, 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. 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, message slips, 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</i></p>	AC		AC	<p>AC=Purpose of record has been fulfilled.</p> <p>O = Paper or electronic</p> <p>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 authorizations (1.2.001) or in records</p>		
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Retention Codes (Field 7)				Archival Codes (Field 8)	
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives	
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SLR 105

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2. Agency Code 719		3. Agency Name Texas State Technical College System						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total			

		<i>routine information used for communication, but not for the documentation, of a specific transaction.</i>				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).		
		Audit						
1.1.002	AB01.000	Annual Audit, Plan and External/Internal Audit Report <i>Includes the working papers that support the audit. Audits and reviews performed by or on behalf of an agency, including the working papers that support the audit. Also includes audits performed on the agency.</i>	AC+7		AC+7	AC =Approval of Plan by Board of Regents or publication or release of final report. <i>The State Auditor's Office retains any copies of its audits performed on Texas State Agencies.</i>		
	AB04.000	Fraud Investigation <i>Reports and Work papers</i>	AC+7		AC+7	AC = Release of final report.		
		AGREEMENTS AND CAPITAL ASSETS RECORDS						

Retention Codes (Field 7)						Archival Codes (Field 8)	
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist			



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Records Retention Schedule

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2. Agency Code 719		3. Agency Name Texas State Technical College System						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival 9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total			

5.1.001	AC03.000	Leases, Contracts and Agreements <i>Including general obligation, land lease, utilities, and construction except for buildings. Documentation include specifications, affidavits of publication of calls for bids, accepted bids, performance bonds, contracts, purchase orders, inspection reports, and correspondence. Memorandums of Understandings, Partnerships, Intellectual Property. Transfer Credit Between TSTC and Other Colleges (Agreement between TSTC and another college)</i>	AC+4		AC+4	AC=Expiration or termination of the instrument according to its terms. All Audit Requirements are Met Prior to Final Disposal		
	AC03.001	Operating Licenses and Permits-Federal Communications Commission (FCC) <i>Station operation and Broadcasting licenses and permits from the Federal Communications Commission (FCC).</i>	AC+3		AC+3	AC = Expiration or cancellation of license or permit.		

Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist			



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SLR 105

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2. Agency Code 719		3. Agency Name Texas State Technical College System							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

4.7.004	AC04.000	Deeds, Titles, and Easements <i>(Capital Asset Records)</i>	LA+3		LA+3				
5.1.017	AC05.000	Contract Log <i>List of agency contracts, leases, and agreements including general obligation, land lease, utilities, and construction contracts.</i>	FE+3		FE+3				
		RESOURCE DEVELOPMENT							
	AD01.000	Donations, Gifts, Bequests	FE+3		FE+3		All Audit Requirements are Met Prior to Final Disposal.		
	AD02.000	Capital Campaign	FE+3		FE+3				
		SUPPORT SERVICES RECORDS							
5.1.003	AE01.001	Courier Authorization and Delivery Reports	2		2				

Retention Codes (Field 7)						Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives					
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist					



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Records Retention Schedule

SLR 105

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2. Agency Code 719		3. Agency Name Texas State Technical College System							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

5.1.004	AE01.002	Mail List, and Mailing Authorization/Log Includes: Address & Telephone Listings <i>Any mailing address, telephone or fax number, or e-mail address records maintained by an agency on its employee or on entities or persons it serves.</i>	US		US				
5.1.005	AE01.003	Postage Expense and Postage Meter Records <i>Records and reports of postage expenses, including postal meter usage.</i>	FE+3		FE+3		All Audit Requirements are Met Prior to Final Disposal		
5.1.007	AE01.004	Requisitions for In-Agency/Inter-agency/Printing Service <i>Includes word processing and data processing</i>	AV		AV				

Retention Codes (Field 7)				Archival Codes (Field 8)			
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AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist			



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SLR 105

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2. Agency Code 719		3. Agency Name Texas State Technical College System								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total					

5.1.010	AE01.005	Licenses and Permits for Non-vehicles <i>Does not include licenses and permits issued by an agency as part of its statutory responsibilities.</i>	AC+2		AC+2	AC = Closed or expires		
5.1.011	AE01.006	Photocopier and Telefax Usage Logs & Reports	AV		AV	<i>Media Code 0 = Paper or Electronic</i>		
5.2.008	AE02.001	Equipment History File; Equipment Service Agreements <i>Agreements or contracts between the agency and equipment vendor to provide maintenance service for equipment. Includes requests for installation, moves, service, etc.; and service/repair logbooks, etc.</i>	LA+3		LA+3			
5.2.010	AE02.002	Equipment Manuals	LA		LA			

Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
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2. Agency Code 719		3. Agency Name Texas State Technical College System							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

5.2.011	AE02.003	Warranties <i>(Equipment)</i>	AC+1		AC+1	AC = Expiration of Warranty.		
5.2.014	AE02.004	Capital Equipment Annual Inventory <i>(Inventory – Annual Physical) Property, equipment, and supply verification. Includes: Facilities Inventory Certification (CBM 011 Room report, CBM 014 Building report)</i>	FE+3		FE+3	All Audit Requirements are Met Prior to Final Disposal		
5.2.016	AE02.005	Inventory Control <i>(Inventory System Update Listings) Listing shows all additions, changes, deletions, and transfer times for the monthly processing period.</i>	AC		AC	AC = Until Transfer of Information onto Annual Listing.		

Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist			



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2. Agency Code		3. Agency Name						10. 106 No.		11. TSLAC ONLY Amend. No.
719		Texas State Technical College System								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total					
5.2.019	AE02.006	Work Orders <i>(Service Orders) Agency copy of forms completed by mechanical service personnel for installation or repair. Includes billing code, service, labor, parts, and remarks.</i>	1		1					
5.2.021	AE02.007	Surplus Property Sale Reports <i>Property Transfer</i>	FE+3		FE+3		All Audit Requirements are Met Prior to Final Disposal.			
5.3.007	AE03.001	Bid Documentation <i>Includes bid requisition/authorization, invitations to bid or propose, bid specifications, accepted and rejected bids, and bid tabulation/evaluations.</i>	FE+3		FE+3		CAUTION: If a formal written contract is the result of a successful bid or request for proposal, the successful bid or request for proposal and its supporting documentation must be retained for the same period as the contract. SEE item number 5.1.001 and 5.2.028			

Retention Codes (Field 7)				Archival Codes (Field 8)	
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives	
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist	



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2. Agency Code		3. Agency Name						10.		11.
719		Texas State Technical College System						106 No.		TSLAC ONLY Amend. No.
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10.	11.	
			Agency	Storage	Total					
5.3.008	AE03.002	Vendor/Voucher Tracking System <i>Purchasing Log, register, etc., providing a record or purchase orders issued, orders received, and similar data on procurement status.</i>	FE+3		FE+3		All Audit Requirements are Met Prior to Final Disposal			
5.3.009	AE03.003	Request for Information <i>Requests for information preliminary to the procurement of goods or services by direct purchase or bid. Includes Request for Price.</i>	AC		AC		AC = Date of direct purchase, issuance of request for bids, or decision not to proceed with the procurement, as applicable			
5.5.001	AE04.001	Billing Detail- Telecommunications (Other Than TEX-AN) <i>In addition to summary detail, includes any accompanying detailed listing of long distance calls. Telephone Billing Detail</i>	FE+3		FE+3		All Audit Requirements are Met Prior to Final Disposal			

Retention Codes (Field 7)				Archival Codes (Field 8)	
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives	
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2. Agency Code 719		3. Agency Name Texas State Technical College System								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total					

5.5.002	AE04.002	Long Distance Telephone Logs <i>Long distance logs created by agencies for internal documentation purposes. Includes any similar logs created for long distance facsimile or electronic transmissions.</i>	AV		AV				
5.5.004	AE04.003	System Activity Reports <i>(Telephone Summary Reports)</i>	AV		AV				
5.5.006	AE04.004	Billing Detail-Telecommunications Log (TEX-AN) <i>In addition to summary detail, includes any accompanying detailed listing of long distance calls.</i>	FE+3		FE+3		All audit requirements are met prior to final disposal.		
5.6.001	AE05.001	Airplane Flight Logs	LA+3		LA+3				
5.6.002	AE05.002	Airplane Passenger Lists	FE+3		FE+3				

Retention Codes (Field 7)						Archival Codes (Field 8)			
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2. Agency Code 719		3. Agency Name Texas State Technical College System							
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			Agency	Storage	Total				

5.6.008	AE05.003	Pilot License Verification	AC+5		AC+5	AC = Termination of employment.		
5.6.003	AE06.001	Inspection Repair and Maintenance Records	LA+1		LA+1			
5.6.004	AE06.002	License and Driving Records Checks	AC		AC	AC = Until superseded or termination of employment.		
5.6.005	AE06.003	Vehicle Use Reports Includes mileage, fuel/oil consumption, passengers carried and other related operational information.	FE+3		FE+3	All audit requirements are met prior to disposal.		
5.6.007	AE06.004	Titles and Registration <i>(Vehicles)</i>	LA		LA	LA = Transfer or sale of vehicle.		
		FISCAL RECORDS						

Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist			



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2. Agency Code 719		3. Agency Name Texas State Technical College System							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				
1.1.004	AF01.001	Legislative Appropriations Requests <i>Includes any supporting documentation created and/or used to justify and support legislative appropriations request by an agency. Instructions for Preparing, Working Papers (Preliminary), Biennial Operating Plan/ Supporting Documentation. Emergency Submission.</i>	AC+6		AC+6	A	AC = September 1 of odd-numbered Calendar years. Required copies sent to Texas State Publications Depository, TSLAC. Only copies of supporting documentation submitted to the Legislative Budget Board are archival.		
4.5.006	AF02.001	Approved Operating Budget <i>Includes: Instructions for Preparing, Backup documentation, budget worksheets & budget detail, expense forecasting worksheets.</i>	FE+3		FE+3		Required by the General Appropriations Act		

Retention Codes (Field 7)						Archival Codes (Field 8)	
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist			



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4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival 9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total			

3.2.001	AF03.001	Employee Deduction Authorizations (LEVY) <i>Documentation used to start, modify, or stop all voluntary or required deductions from payroll, including garnishment or other court-ordered attachments. Includes: Child Support B.7.a, Student Loan B.7.b, Tax Levy B.7.c Bankruptcy B.7.d, TRS Levy B.7.e Medical Support Order (MSO)</i>	AC+4		AC+4	AC = After termination of employee or after amendment, expiration, or termination of authorization, whichever sooner.		
3.2.002	AF03.002	Employee Earnings Records <i>Payroll Master File</i>	FE+4		FE+4	40 TAC 815.106(i)		
3.2.003	AF03.003	Federal Tax Records <i>Includes 1099, 1098T, W2, FICA, and other tax records.</i>	AC+5		AC+5	AC = Tax due date, date the claim is filed, or date tax is paid whichever is later. 26 CFR 31.6001-1(e) (2).		

Retention Codes (Field 7)				Archival Codes (Field 8)	
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			Agency	Storage	Total					

3.2.004	AF03.004	Income Adjustments Authorizations <i>Used to make increases or decreases to employees' gross pay, FICA, retirement, or in the computation of taxes. (Personnel/Payroll Actions)</i>	AC+5		AC+5	AC = Termination of employment 29 CFR 516.6(c)		
3.2.005	AF03.005	W-4 Forms <i>B.5.a</i>	AC+5		AC+5	26 CFR 31.6001-1 (e) (2). AC = Until superseded, obsolete, or upon separation of employee.		
3.2.006	AF03.006	Wage Rate Table – Classified Pay Plan	2		2	29 CFR 516.6(a) (2).		
3.2.007	AF03.007	Unemployment Compensation Records	AC+5		AC+5	AC = Termination of employment.		
3.2.008	AF03.008	Direct Deposit Application/Authorizations <i>B.6.A.</i>	US+2		US+2			

Retention Codes (Field 7)				Archival Codes (Field 8)			
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			Agency	Storage	Total				
3.2.009	AF03.009	State Deferred Compensation Records <i>(Payroll Records)</i>	AC+5		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		
3.2.010	AF03.010	Human Resource Information System Reports (HRIS) <i>Includes supporting documentation</i>	AC+5		AC+5		AC = Termination of employment		
3.4.006	AF03.013	Time Sheets <i>E.4.t Attendance/ Leave Pay Form (ALP's)</i>	FE+4		FE+4		40 TAC 815.106(i)		

Retention Codes (Field 7)				Archival Codes (Field 8)	
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			Agency	Storage	Total				

3.4.007	AF03.014	Time Off and/or Sick Leave Requests <i>Includes Attendance and Leave Summaries (Admin., With & Without Pay) E.4.p Leave Requests E.4.u Return to Work Statement/Light Duty Statement E.4.v</i>	FE+4		FE+4				
4.1.001	AF04.001	Accounts Payable Information	FE+3		FE+3				
4.1.002	AF04.002	Billing Detail	FE+5		FE+5		Caution: Does not include long distance telephone billing detail.		
4.1.003	AF04.003	Canceled Checks/Stubs/Warrants/Drafts <i>Void checks</i>	FE+5		FE+5				
4.1.004	AF04.004	Encumbrance Detail	FE+10		FE+10				
4.1.005	AF04.005	Inventory and Other Cost Files	FE+5		FE+5				

Retention Codes (Field 7)				Archival Codes (Field 8)			
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			Agency	Storage	Total				
4.1.006	AF04.006	Investment Transaction Files <i>(Bank Correspondence) CDs, Collateral, Letter of Credit.</i>	FE+5		FE+5				
4.1.007	AF04.007	Transfers or Budget Revisions <i>Transfers for adjustment to budgets</i>	FE+5		FE+5				
4.2.001	AF05.001	Cash Deposits Vouchers <i>(Bank Deposits) Cash deposit slips</i>	FE+3		FE+3				
4.2.002	AF05.002	Cash Receipts <i>Includes receipts for fees (permits, licenses, renewals, etc.)</i>	FE+5		FE+5				
4.2.003	AF05.003	Daily Cash Receipts Logs <i>(Daily Deposit Sheets) Cash Count Sheets</i>	FE+5		FE+5				

Retention Codes (Field 7)				Archival Codes (Field 8)	
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			Agency	Storage	Total				
4.2.005	AF05.004	Purchase Vouchers <i>Requisitions, orders, receiving reports, invoices, or statements, change orders, best value determinations, etc. Includes: Computer Acquisition, Office Supplies and Other Acquisitions. Accounts Payable- Transactions Log</i>	FE+3		FE+3		<i>All Audit Requirements are Met Prior to Final Disposal</i>		
4.2.006	AF05.005	General Journal Voucher <i>Includes: Journal Entries (Expenditure Transfer Voucher (ETV))</i>	FE+3		FE+3				
4.2.007	AF05.006	Expenditure Voucher <i>Travel, payroll, etc. Includes Payroll Batches</i>	FE+3		FE+3				
4.3.002	AF06.001	Receipt Journals or Registers <i>Cash Receipt Report-Financial Services</i>	FE+3		FE+3				

Retention Codes (Field 7)				Archival Codes (Field 8)			
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			Agency	Storage	Total			
4.3.003	AF06.002	Expenditures Journals or Registers <i>Requisition Report-System Financial Services</i>	FE+3		FE+3			
4.4.001	AF07.001	General and Subsidiary Ledgers (General Ledger Balance Sheet)	FE+5		FE+5			
4.4.002	AF07.002	Accounts Receivable Ledgers <i>Includes: Student Receivables, Promissory Notes, Tuition and Fee Loan, Collections Letter, Book Loans, Correspondence, Insurance Application, Insurance Change Form, Returned 1098T, Returned Mail Envelope, Sponsored Billing, Bookstore Invoice. Credit Card Refund, Loan Agreements, Payment Plans, R2T4 Letters (Return of Title IV), NSF, Letters from the</i>	FE+3		FE+3			

Retention Codes (Field 7)				Archival Codes (Field 8)			
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			Agency	Storage	Total				

		<i>Sponsor, Invoices – out to Sponsor, Student Invoices from Bookstore purchases, Notification of Award Letters, Daily Balance Sheets, Deposit Slips, Credit Card Reports, Loan Information Session, Collection Payment Plan, Bookstore Reconciliation Sheet</i>							
4.4.003	AF07.003	Accounts Payable Ledger <i>Includes Liabilities, State Reimbursement, Payroll, Insurance, Optional Retirement Plan, Retirees Insurance, Refundable Deposit, Voucher Listing, Warrant/Voucher Comparison, Warrant Listing</i>	FE+3		FE+3		<i>All Audit Requirements are Met Prior to Final Disposal</i>		
5.1.012	AF07.004	Charge Schedules/Price Lists <i>Schedules of prices charged by an agency for services to the public or other agencies, including any documentation used to determine the charges.</i>	US+3		US+3				

Retention Codes (Field 7)						Archival Codes (Field 8)			
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			Agency	Storage	Total				

4.4.004	AF07.005	Employee Savings Bond <i>(Ledgers)</i>	FE+3		FE+3				
4.5.001	AF08.001	Worksheets for Preparing Reports	FE+3		FE+3				
4.5.002	AF08.002	Internal Fiscal Management Reports <i>Includes agency monthly budget reports, Investment Report-System Financial Services, Requests for budget Change and Budget Summary, Analysis of Proposed Budget.</i>	FE+3		FE+3				
4.5.003	AF08.003	Annual Financial Reports Required by the General Appropriations Act (100 Day Report)	AC+6		AC+6		AC = September 1 of odd-numbered calendar years. Permanent Record Copy Retained in Records Center. (Required copies sent to Texas State Publications Depository, TSLAC).		

Retention Codes (Field 7)				Archival Codes (Field 8)			
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			Agency	Storage	Total				

4.5.005	AF08.004	External Fiscal Reports <i>Special purpose – i.e. federal financial reports, salary reports, etc. Includes HUB Reports. LBB Reports</i>	FE+3		FE+3				
4.5.007	AF08.005	USAS Reports – Daily <i>Vendor Hold Reports-Financial Services</i>	AC		AC		AC = Receipt and reconciliation of monthly report		
4.5.008	AF08.006	USAS Reports – Monthly	AC		AC		AC = Receipt and reconciliation of annual report		
4.5.009	AF08.007	USAS Reports – Annual	FE+3		FE+3				
4.6.002	AF09.001	Reconciliations	FE+3		FE+3				
	AF10.001	Taxes - Sales, Public Property & Tax Abatement District	5		5				
4.7.002	AF11.001	Bank Statements	FE+5		FE+5				

Retention Codes (Field 7)				Archival Codes (Field 8)	
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			Agency	Storage	Total				

4.7.003	AF11.002	Returned Checks/Warrants/Drafts (Uncollectible)	AC+5		AC+5	AC=After collection or after deemed uncollectible		
4.7.006	AF11.003	Comptroller Statements <i>(Appropriations/Accounting/Purchase Order Summaries)</i>	FE+3		FE+3			
4.7.010	AF11.004	Long-Term Liability Records (Revenue Bond Issues) <i>Bonds, etc. Includes: Equipment Lease Financing Resolution, Federal Tax Certificate & Exhibits</i>	AC+3		AC+3	AC = Retirement of debt.		
4.7.012	AF11.005	Signature Authorizations	US+ FE+3		US+ FE+3			

Retention Codes (Field 7)				Archival Codes (Field 8)			
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			Agency	Storage	Total				
4.7.008	AF11.006	Grants Records <i>Includes Federal, State and Local grants. Grant Contracts and Grant Reports</i>	AC+3		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 federal, state, and local funding agency. Agencies must ensure that records are retained for the appropriate retention period as required by the grant funding agency or default to RRS retention period.		
4.7.007	AF11.007	Detail Chart of Accounts <i>One for all accounts in use for a fiscal year.</i>	FE+3		FE+3				

Retention Codes (Field 7)						Archival Codes (Field 8)	
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			Agency	Storage	Total					

5.1.013	AF12.000	Insurance Policies-Vehicles, Equipment, etc. <i>Includes: Employee Crime Policy, Directors & Officers Liability Policy</i>	AC+4		AC+4	AC=Expiration or termination of the policy according to its terms.		
		GOVERNMENT AGENCIES & DEPARTMENTS						
1.1.027	AG02.002	Proposed Legislature and Priorities (State) <i>Drafts of proposed legislation and related correspondence.</i>	AV		AV			
	AG02.005	Personal Financial Statement (State)	AC+3		AC+3	AC = After termination of employment. Original filed with Secretary of State <i>Filed in accordance with chapter 572 of the Government Code.</i>		

Retention Codes (Field 7)				Archival Codes (Field 8)			
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HUMAN RESOURCES									
3.1.002	AH01.001	Applications/Resumes/Job Bid Forms <i>(Applications for Employment – Hired) Applications E.1.a, resumes E.1.b, letters of reference E.1.d, and similar documents whose submission by candidates for vacant positions is required on the application form, by application procedures, or in the employment advertisement. File all transcripts at AH01.016</i> <i>Includes: Letters of Interest/Job Bid Forms E.1.c</i>	AC+5		AC+5		AC = Termination of employment.		

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3.1.014	AH01.002	<p>Employment Selection Records</p> <p><i>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.</i></p> <p><i>Includes:</i></p> <p>Acceptance/Rejection Notifications S.2.i Pre-Employee Checklist E.4.n Health Questionnaire/Exam S.1.i Interview Questions S.2.b Credit Check S.2.g Drug Screens S.2.h Declaration of English Proficiency E.2.c Birth Certificate S.1.b Driver's License, SSN card, Other ID/License</p>	AC+5		AC+5	AC = Termination of employment. 29 CFR 1602.49		
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Retention Codes (Field 7)						Archival Codes (Field 8)		
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		<i>Check S.1.c Veteran Verification of Selective Service/Veteran's S.1.h Veteran Status/Certification S.1.g Verification of Employment (Former and Present)E.4.aHiring Matrix S.2.c</i>							
3.1.023	AH01.004	Position/Job Descriptions <i>Job descriptions, including all associated task or skill statements, for position in an agency.</i>	AC+4		AC+4		40 TAC 815.106(i) AC = Until superseded or job eliminated.		
3.1.013	AH01.005	Employment Contracts/Letter of Intent <i>Includes: Contract Letter E.5.f Employment Intent Letter for next FY E.5.g Non-Renewal Letter E.5.h</i>	AC+5		AC+5		AC = Expiration or termination of the Instrument according to its terms.		

Retention Codes (Field 7)				Archival Codes (Field 8)			
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3.1.022	AH01.006	<p>Personnel Forms</p> <p><i>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.</i></p> <p><i>Includes:</i></p> <ul style="list-style-type: none"> <i>Name Change Form E.4.a</i> <i>Marriage License S.1.e</i> <i>Divorce Decree</i> <i>Change Notification E.5.b</i> <i>Request for Manual Check E.5.e</i> <i>Resignation Letter E.6.c</i> <i>Exit Questionnaire/Interview E.6.b</i> <i>Longevity Date Acknowledgement E.4.r</i> <i>Alternative Work Schedule E.4.w</i> <i>Nepotism Statement E.4.f</i> <i>Faculty and Staff Handbook Acknowledgement E.4.e</i> 	AC+5		AC+5	AC = Termination of employment 29 CFR 1602.49(a)		
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Retention Codes (Field 7)				Archival Codes (Field 8)			
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		Sexual Harassment Statement E.4.g Racial Harassment Statement E.4.h Drugs and Alcohol Statement E.4.j Employee Affidavit Statement E.4.k Crime Victim Identification Statement E.4.1 Student Employment Info. Affidavit Driving Authorization-Employee/Student Employee						
3.1.018	AH01.007	Grievances S.3.a Records relating to the review of employee grievances against personnel policies, working conditions, etc.	AC+5		AC+5		AC=Final decision on the grievance of the employee. CAUTION: Does not include formal complaints filed by an agency employee with the Equal Employment Office (EEO) of the U.S. Department of Labor. See Item 1.1.048.	

Retention Codes (Field 7)				Archival Codes (Field 8)			
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4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				
3.1.039	AH01.008	Ombudsman Records S.3.c <i>Consultation records, notes, letters, memos, emails, reports and other documentation maintained.</i>	AC		AC		AC = Final decision or matter closed Does not include formal complaints filed with EEO. If matter becomes a grievance or the subject of counseling or litigation, or employee is subject to disciplinary action, the records are subject to retention in the appropriate records series.		
3.1.001	AH01.009	Applications of Those not Hired S.2.e <i>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.</i>	2		2		29 CFR 1602. 49(a)		

Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist			



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2. Agency Code 719		3. Agency Name Texas State Technical College System							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

3.1.012	AH01.010	Employment Opportunity Announcements (Personnel Requisitions) <i>S.2.a and Advertising S.2.d Internal or external announcements or advertisements or job openings, promotions, training programs, or opportunities for overtime.</i>	2		2		29 CFR 1602.49(a)		
3.1.026	AH01.011	Criminal Background Checks <i>S.2.f Criminal history record information on job Applicants or agency employees.</i>	AC		AC		AC = Criminal history record has served the immediate purpose for which it was obtained.		
3.1.006	AH01.012	Employee Counseling Records <i>E.3.f Notes, memoranda, or reports relating to the counseling of an employee for work-related, personal, or substance abuse problems. Usually maintained at the supervisor level.</i>	AC+5		AC+5		AC = Termination of employment.		

Retention Codes (Field 7)						Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives					
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist					



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2. Agency Code 719		3. Agency Name Texas State Technical College System								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total					

3.1.019	AH01.013	Performance Appraisals (Evaluations) <i>E.3.a</i>	AC+5		AC+5	29 CFR 1620.32(c) AC = Termination of employment		
3.1.020	AH01.014	Personnel Corrective Action <i>Documentation</i> <i>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.</i> <i>Includes: Letter of Reprimand E.3.b and Corrective Action Documentation E.3.d</i>	AC+5		AC+5	AC = Termination of employee <i>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 item number 3.1.021, all documentation from this series used to support disciplinary action must be retained for the minimum retention period described by item number 3.1.021.</i>		

Retention Codes (Field 7)						Archival Codes (Field 8)		
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives				
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist				



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4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival 9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total			

3.1.021	AH01.015	<p>Personnel Disciplinary Action</p> <p><i>Documentation</i> <i>E.3.e</i> <i>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 effort, as well as favorable and unfavorable communications.</i></p>	AC+5		AC+5	AC = Termination of Employment		
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Retention Codes (Field 7)				Archival Codes (Field 8)	
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives	
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			Agency	Storage	Total					

3.1.027	AH01.016	<p>Training and Educational Achievement</p> <p>(Individual) <i>Degrees Earned, Internships, In-service Training, Pre-Employment test, Certificates of completion, transcripts, tests scores, or similar records documenting the training, testing, or continuing education achievements of an employee</i> <i>Includes:</i> <i>Human Resources</i> <i>Pre-Employment Test S. 1.o</i> <i>Transcripts/Degrees E.2.a</i> <i>Internships E.2.g</i> <i>Request to Enroll in Courses, E.2.e</i> <i>Critical Skills/Development Plan E.3.b</i> <i>Educational Benefit Prog.-Dependent Certification</i> <i>Educational Services- In-Service Training</i></p>	AC+5		AC+5	AC = Termination of employment		
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Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist			



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			Agency	Storage	Total			

3.1.037	AH01.017	Employee Recognition Records <i>Awards, incentives, tenure, etc. Includes: Awards, Certificates E.2.d Letters of Achievement E.2.d, Employee Recognition/Letter or Appreciation E.2.f</i>	AC+5		AC+5	AC = Termination of employment.		
3.1.038	AH01.018	Public Access Option Form <i>E.4.s Forms 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.</i>	US		US	<i>Government Code 552.024 After termination of employment, the last public access option form – TSTC-1-058 must move to records series 3.3.011.</i>		

Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist			



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			Agency	Storage	Total					

3.1.029	AH01.019	Documentation or Verification of Employment Eligibility <i>(Verification Form I-9) S.1.d</i>	AC+5		AC+5	AC = Termination of employment 8 CFR 274a.2(b) (2) (i) (A) and (c) (2) <i>CAUTION: Federal regulation requires that INS I-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.</i>		
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Retention Codes (Field 7)				Archival Codes (Field 8)	
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives	
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			Agency	Storage	Total			

3.1.031	AH01.020	<p>Employee Benefits - Other than Insurance</p> <p><i>Agency copies of information relating to the selection of available benefit options other than insurance. (Retirement Benefit Records). Surviving Spouses, Retirement Forms – TRS (Other than Insurance Health and Medical).</i></p> <p><i>Includes:</i></p> <p><i>TRS 11-Beneficiary Form B.2.e</i></p> <p><i>TRS 13-Acceptable Proof of Age B.2.f</i></p> <p><i>TRS 18-Request or EST Retirement Benefits B.2.g</i></p> <p><i>TRS 19-Cert of Non-Creditable Comp B.2.h</i></p> <p><i>TRS 58-Statement of Attend Physician-Disability B.2.i</i></p> <p><i>TR 58A-Statement of Attend Physician-Disability B.2.m</i></p> <p><i>TR 58C-Statement of Attend Physician-Disability B.2.n</i></p> <p><i>TR 58E-Statement of Attend Physician-Disability B.2.o</i></p>	AC+5		AC+5	<p>AC = Until superseded or termination of employment</p> <p>Article 3.50-3 Texas College & University Employees Uniform Insurance Benefits Act.</p> <p>CAUTION: Documents that serve as payroll deduction authorization must be maintained for the retention period prescribed for item number 3.2.001.</p>		
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Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist			



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			Agency	Storage	Total					

		<i>TRs 59A-Statement of Member-Disability B.2.p</i> <i>TRs 108-Request for Information B.2.r</i> <i>TRs 221-Verification or Service & Salary B.2.s</i> <i>TRs 228-Income Tax Withholding Form B.2.t</i> <i>TRs 278-Direct Deposit Request B.2.u</i> <i>TRs 358-Change Of Address B.2.v</i> <i>TRs Partial Lump Sum Distribution B.2. w</i> <i>TRs 123-Request or EST Retirement Benefits B.2.y</i> <i>TRs 25-Serv. Retirement Benefit W/Partial Lump B.2.z</i>							
3.1.011	AH01.021	Employee Retirement System (ERS) of Texas Forms and Other Insurances <i>Agency copies of information relating to the selection</i>	AC+5		AC+5		AC = Until superseded or termination of employment. Documents that serve as payroll deduction authorizations must be maintained for the retention period prescribed for item number 3.2.001.		

Retention Codes (Field 7)						Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives					
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist					



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			Agency	Storage	Total	9. Remarks		

		<i>by employees of life, disability, health, and other types of insurance offered by the State of Texas to its employees. Includes: Dental Enrollment B.4.a Cancer Insurance B.8.a ERS Insurance Multipurpose-GI-1. 180&1. 181 B.1.a ERS Uniform Group Ins. Supp-GI1. 207&1. 168 B.1.b ERS Person Information-GI-1.210 B.1.c ERS Texflex Reimbursement B.1.d ERS Beneficiary Life Insurance- 2.395 B.1e ERS Summer Enrollment-GI-1.222 B.1.f ERS Employee Uniform Group Ins.-Child-GI.1.081 B.1.g ERS Skip Form B.1.h ERS Evidence of Insurability- EOI-EE B.1.i ERS Disability Form/Claim for Disability Benefits B.1.j ERS Schedule of Ins Coverage Printout B.1.m</i>						
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Retention Codes (Field 7)				Archival Codes (Field 8)	
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives	
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist	



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2. Agency Code 719		3. Agency Name Texas State Technical College System						
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			Agency	Storage	Total			

		<i>ERS Request CVGE. for Disabled Depend Child-GI B.1.n Insurance Exception Request B.1.q Texasaver 457 Plan Agreement</i>						
3.3.004	AH02.001	Employee Benefits Plans <i>Employee benefit plans, including amendments</i> <i>Includes: Emoluments Fitness and Wellness Insurance Administration</i>	US+3		US+3		29 CFR 1627. 3(b) (2).	
3.3.027	AH02.002	Aptitude and Skills Tests <i>S.1.m Aptitude or skills tests required of job applicants or of current personnel to qualify for promotion or transfer.</i>	AC+5		AC+5		AC = Termination of employment 29 CFR 1602.49	

Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist			



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2. Agency Code 719		3. Agency Name Texas State Technical College System						
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			Agency	Storage	Total			

3.3.011	AH02.003	Personnel Information Form (Former Employee Verification Records) <i>Includes: Final Address Form E.6.e Verification of Prior Employment (State Service)/BRP E.4.m Employment Notification E.5.a Termination Notification E.5.c Employment Separation Agreement Campus Clearance Form E.6.a ERS TRS/ORP Dir Pay Retiree Enrl.-GI-1.183&1.185B.1.k ERS Termination/Cobra GI-1.163&1.182 B.1.l TRS 5- Membership Form B.2.a TRS 6- Final Deposit/Request For Refund B.2.b TRS 7- Final Deposit Before Retirement B.2.c TRS 8- Final Deposit For Deceased Member B.2.d Claim For Death Benefits B.1.p</i>	AC+75		AC+75	AC = Termination of employment. See item number 3.1.038 <i>Minimum information needed to verify employment, includes name, social security number, exact dates of employment, last known address and most recent public access option form – TSTC-1-058.</i>		
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Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
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			Agency	Storage	Total			

		<i>TRS 28- Notice To Participate In ORP B.2.i</i> <i>TRS 29- Application for Refund ORP B.2.j</i> <i>TRS 30- Application for Service Retirement B.2.k</i> <i>TRS 59- Application for Disability Retirement B.2.p</i> <i>ORP Carrier Vesting Letter B.3.a</i> <i>ORP Authorization B.3.b</i> <i>TSA Authorization B.3.c</i> <i>Maximum Exclusion Allowance B.3.d</i> <i>Last Public access option form – TSTC-1-058</i> <i>Death Certificate S.1.j</i> <i>Personal Data Sheet S.1.f</i> <i>Release of Information/Court</i>						
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Retention Codes (Field 7)				Archival Codes (Field 8)	
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives	
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			Agency	Storage	Total					

3.3.024	AH02.004	<p>Personnel Policies and Procedures Includes: Compensation Manual, Employee Assistance Program</p> <p><i>Any internally distributed manuals, guidelines, or similar records that define agency wide policies and procedures concerning the personnel of an agency.</i></p>	US+3		US+3				
3.3.031	AH02.005	<p>EEO Reports and Supporting Documentation</p> <p><i>(Applicant/Employee EEO Forms)</i></p> <p><i>Includes documentation used to complete EEO reports. S.1.a Veteran Workforce Summary Report - Quarterly</i></p>	AC+5		AC+5		AC = Termination of employment 29 CFR 1602.32, 1602.39, 1602.41, 1602.48, and 1602.50.		

Retention Codes (Field 7)						Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives					
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			Agency	Storage	Total				

3.3.030	AH02.006	Training Administration Records <i>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 program, services, or projects.</i>	US+2		US+2		<i>CAUTION: Does not include hazardous material training records. SEE item number 5.4.007</i>		
3.3.001	AH02.007	Affirmative Action Plans <i>Affirmative action plans for both regular employees and apprenticeship programs.</i>	5		5		29 CFR 30.8(e) for apprenticeship plans		
3.3.010	AH02.008	Labor Statistics Reports <i>Reports providing statistical information on labor force. Includes: Factual Reports and Comparisons, Agency New hire/Workforce Summary - Annual</i>	3		3				

Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
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			Agency	Storage	Total				

3.3.020	AH02.009	Work Schedules/Assignments <i>Work, duty, shift, crew, or case schedules, rosters, or assignments. Includes: Faculty Schedules</i>	1		1				
3.3	AH02.010	Faculty Ranking/Certification <i>E.3.g Instructor Ranking E.3.h</i>	AC+5		AC+5		AC = After Termination of employment		
	AH03.001	Texas Innovation Network System Reports (TINS)	3		3	R			
3.4.002	AH03.002	Leave Status Reports <i>Cumulative report is issued each pay cycle and provides employee leave status information for each position.</i>	FE+3		FE+3				

Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
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			Agency	Storage	Total				
3.4.008	AH03.003	Sick Leave Pool Documentation <i>S.1.k Requests submitted, approvals, number of hours transferred in and out, etc. Sick Leave Pool Donation</i>	FE+3		FE+3		EEO Compliance		
3.4.001	AH03.004	Accumulated Leave Adjustment Requests <i>Accumulated Leave Adjustment Requests Used to create employee leave balances, to transfer leave balances when an employee transfers positions, to adjust carry-over balances on August 31, to correct errors on leave accumulation, and to close out leave accounts on separated employees.</i>	FE+3		FE+3				

Retention Codes (Field 7)						Archival Codes (Field 8)	
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			Agency	Storage	Total			
3.3.026	AH03.005	Agency Staffing Reports <i>Agency reports compiled by an agency on aspects of personnel staffing, including listings of all staff by program or name, staff hired during a month, detailed listings of employees within its organizational structure, position vacancies, analyses of turnover rates and seasonality of employment, etc.</i> <i>Includes: Quarterly Full-Time Employee (FTE) Reports, Rating System for Program Chair and Instructional Staffing.</i>	US+3		US+3			
3.4.004	AH03.006	Overtime Authorizations	2		2			
		EDUCATIONAL SERVICES						
	AI01.001	Instruction - Class Book and Tool List	US		US			

Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
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			Agency	Storage	Total					

	AI02.001	Curriculum Standards	US		US				
	AI02.002	Curriculum Instructional Name <i>(Instructional Name Change)</i>	US		US				
	AI03.001	Instructional Development Services <i>Educational Services Instructional Delivery/Curriculum (Course Syllabus/Curriculum), Instructional Development, Individualized Instruction, Specialized Instruction, Application for New Plant Startup Expansion and Industrial Training, Continuing Education, Programs (Existing), Advisory Committees, Advanced Technology, Program Approval, Development- Plan, Task Lists/DACUM, New Program Development, Investigations of New Programs, WECM/Semester Conversion</i>	AV		AV		*EPA Testing Certification/supporting documents are permanent records.		

Retention Codes (Field 7)						Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives					
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist					



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			Agency	Storage	Total				

		<i>Instructional Network Services, Collaborative Projects, Secondary Programs, Post-Secondary Programs, Scheduling and Youth Opportunities/Tech-Prep Program records. Distant Learning, Corporate College, Work Force Development Records-(Regions, Maps, TSTC Participants List, Reports and Economic Data), Student Success, Mentoring. *EPA Testing Certification, Unit Action Plans</i>							
	AI06.001	Accreditation Planning Records <i>Application, Preliminary Self Study, Site Visit Documentation, Recommendations and Findings.</i>	AV		AV	R			

Retention Codes (Field 7)						Archival Codes (Field 8)			
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			Agency	Storage	Total					

	AI06.002	Final Accreditation Reports <i>Final self-study evaluation reports and investigative reports. Final accreditation reports from accrediting agencies relating to the accreditation status.</i>	PM		PM	R			
	AI06.003	Accreditation - Institutional Effectiveness	US+1		US+1	R			
	AI07.003	External Student Reports <i>Office of Civil Rights Student Data, summary of semester/contact hours, summary of contact/end of quarter hours, Texas Success Initiative, Building and room usage, end of semester term hours, facility and yearly graduation (CBM-TASP/TSI Reports).</i>	PM		PM	R	Security Code C = Privacy Act		

Retention Codes (Field 7)						Archival Codes (Field 8)			
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	AI07.004	Internal Student Reports <i>Non-Attendance, Educational intent, impoundments, retention/attrition, enrollment data and special population.</i>	PM		PM	R	<i>Security Code C = Privacy Act</i>		
		FACILITIES							
	AJ02.000	New/Construction/Rehabilitation/Modification	AC+10		AC+10	R	AC = Completion of Project.		
5.2.002	AJ02.001	Building Construction Project Files <i>New construction/rehabilitation/modification Planning, design, and construction records; accepted and rejected bids; correspondence, etc. Waco, Harlingen, Amarillo Property, West Texas, Marshall.</i>	AC+10		AC+10	R	AC = Completion of Project. SEE ALSO item numbers 5.2.003 and 5.2.028. <i>ALL Amarillo Landfill property records are Permanent records.</i>		

Retention Codes (Field 7)						Archival Codes (Field 8)			
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5.2.028	AJ02.002	Building Construction Contract and Inspection Records <i>Building construction contracts, surety bonds, and inspection records. Certificate of Occupancy, Master Plan Certification Facilities- Master Plans</i>	LA+10		LA+10	R	SEE ALSO item numbers 5.2.002 and 5.2.003. ALL Amarillo Landfill property records are Permanent records.		
5.2.003	AJ02.003	Building Plans and Specifications- Agency Owned or Leased <i>Includes architectural and engineering drawings, profiles, and blueprints.</i>	State owned LA Lease d AC+2		State owned LA Lease d AC+2	R	Archival review designation is for state-owned buildings only. AC = For leased buildings; termination or cancellation of lease. ALL Amarillo Landfill property records are Permanent records. SEE ALSO item numbers 5.2.002 and 5.2.028		
5.2.022	AJ03.000	Utility Usage Reports <i>Facilities & Airport</i>	AV		AV				

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			Agency	Storage	Total			

5.2.004	AJ05.000	Building Space (Facility Requests)	1		1			
	AJ06.001	Family/Single Housing Records: <i>Application, Lease/Contract, Correspondence, Housing Memo, Eviction Notice, Request to Transfer, Receipts, Non-Paid Notice. Notifications-State (Asbestos Addendums, Lead), Housing Utilities, Application fee receipt, Bulleted List, Move-In Check List, Personal Documents (Applicant), Tenant Tracker, Make Ready List-inside & outside, Student/Employee Verification, Housing Activity Memo, Walk-thru photos, Waco Housing Document, Cable form, Additional Occupant, Pet Deposits, picture, vaccine records, Reserve Release Letters, Condition Reports.</i>	AC+4		AC+4		AC = Expiration or termination of the instrument according to its terms. All Audit Requirements are met prior to Final disposal.	
	AJ06.003.1	Family/Single Student Housing Reports	1		1		Security Code C = Privacy Act	

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	AJ06.004	Rental Rates	US+3		US+3				
	AJ07.001	Acquisition	LA		LA				
5.2.001	AJ07.002	Appraisals – Building or Property	AV		AV	R			
	AJ08.000	Environmental Hazard Incidents <i>Includes: Amarillo incidents</i>	60		60				
		ORGANIZATIONS, CLUBS, COMMITTEES							
	AK05.000	Memberships <i>Organization name, correspondence and documentation.</i>	AC+3		AC+3		AC = Approval of annual membership.		

Retention Codes (Field 7)				Archival Codes (Field 8)			
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RISK MANAGEMENT									
5.4.001	AL00.001	Accident Reports <i>Associated Documentation Workers Compensation Benefits Acknowledgement E.4.i</i>	CE+5		CE+5		29 CFR 1904.33 (Accident or occupational disease reports (by supervisors and employees) and other associated reports required to be submitted to the Texas Department of Insurance or its predecessors or maintained internally on accidental frequency).		
5.4.013	AL00.002	Disaster Preparedness and Recovery Plans <i>Safety/Risk Management Plan</i>	US		US				
5.4.002	AL00.003	Evacuation Plan Plans for evacuation of agency facilities in cases of emergency.	US		US				

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			Agency	Storage	Total					

5.4.004	AL00.004	Fire Orders <i>Orders issued by Fire Marshal to correct deficiencies in compliance with the fire code.</i>	AC+3		AC+3	AC = Deficiency corrected.		
5.4.007	AL00.005	Hazardous Materials Training Records <i>Records of training given employees in an agency hazard communications program.</i>	5		5	Texas Health & Safety Code, 502.009(g)		
5.4.008	AL00.006	Hazard Communication Plans	US+5		US+5	Texas Health & Safety Code, 502.009(g)		
5.4.003	AL00.007	Inspection Records <i>Fire, safety, and other inspection records of agency facilities and equipment.</i> <i>Includes Building Safety Checklist Asbestos Addendum</i>	AC+3		AC+3	AC = Date of the correction of the deficiency, if the inspection report reveals a deficiency. CAUTION: Does not include inspection reports of building construction. SEE item 5.2.028		

Retention Codes (Field 7)						Archival Codes (Field 8)		
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5.4.010	AL00.008	Material Safety Data Sheets	AC		AC		AC = After sheets are updated or hazardous chemical is no longer stored by agency, as applicable.		
	AL00.009	Reports - Employers Report of Injury or Illness <i>Mandated documentation by Texas Department of Insurance</i>	30		30				
5.4.011	AL00.010	Visitor Control Registers <i>Logs, registers, or similar records documenting visitors to limited access or restricted areas of facilities.</i>	3		3				
5.4.009	AL00.011	Workplace Chemical Lists	30		30		Texas Health & Safety Code, 502.005(d)		
	AL00.012	Chemical & Hazardous Waste Disposal Records <i>Form 8700</i>	30		30				

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		ELECTRONIC DATA PROCESSING RECORDS						
	AM01.001	Management Information Projects	AC+3		AC+3	AC = After closure of project.		
2.1.001	AM01.002	Processing Files <i>Machine-readable files used in the creation, utilization, and updating of master files.</i>	AC		AC	AC = Completed 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.		
2.1.002	AM01.003	Master Files <i>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.</i>	AC		AC	AC = Completed 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.		

Retention Codes (Field 7)						Archival Codes (Field 8)		
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			Agency	Storage	Total			

2.1.007	AM01.004	Software Programs <i>(Module Information)</i> <i>Automated software applications and operating system files including job control language, program listing/source code, etc.</i>	AC		AC	AC = Until electronic records are transferred to and made usable in a new software environment or there are no electronic records being retained to meet an approved retention period that require the software to be retrieved and read. 13 TAC 6.94. CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.		
	AM01.005	Data Analysis <i>Information or data collected and compiled for the purpose of producing non-fiscal (raw data) reports.</i>	AV		AV			

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2.1.008	AM01.006	Hardware Documentation <i>(Operational System Files) Records documenting operational and maintenance requirements of computer hardware such as operating manuals, hardware/operating system requirements, hardware configurations, and equipment control systems.</i>	AC		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. 13 TAC 6.94 CAUTION: Software needed for access to electronic records must be retained for the period of time required to access.		
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Retention Codes (Field 7)				Archival Codes (Field 8)	
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2.1.009	AM01.007	<p>Technical Documentation</p> <p><i>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</i></p>	AC		AC	<p>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 13 TAC. 6.94</p> <p>CAUTION: Software needed for access to electronic records must be retained for the period of time required to access.</p>		
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Retention Codes (Field 7)				Archival Codes (Field 8)	
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		<i>records that explain the meaning, purpose, structure, logical relationships, and origin of the data elements.</i>							
2.1.010	AM01.008	Audit Trail Records <i>Files needed for electronic data audits such as files or reports showing transactions accepted, rejected, suspended, and/or processed; history files/tapes; records of on-line updates to application files or security logs.</i>	AC		AC		AC = All audit requirements have been met.		
2.1.011	AM01.009	Finding Aids, Indexes, and Tracking Systems <i>Automated indexes, lists, registers, and other finding aids used to provide access to records.</i> <i>Circuit/Internet ID Numbers</i>	AC		AC		AC = After Closed CAUTION: These records must carry the same retention period and archival code of the records they support.		

Retention Codes (Field 7)				Archival Codes (Field 8)			
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2.2.001	AM02.001	System Monitoring Records <i>Electronic files or automated logs created to monitor computer systems such as print spool logs, console logs, tape activity logs, etc.</i>	AV		AV				
2.2.010	AM02.002	IT Departmental Procedures <i>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.</i>	US+3		US+3		<i>Caution: Does not include technical documentation of procedures necessary for reading or processing of electronic records. SEE item number 2.1.009.</i>		
2.2.011	AM02.003	Batch Data Entry Control Records <i>Forms and logs used to reconcile batches submitted for processing against batches received and processed.</i>	AC		AC		AC = When reconciliation confirmed.		

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2.2.013	AM02.004	Quality Assurance Records	AC		AC		AC = No longer needed as an audit trail for any records modified.		
2.2.014	AM02.005	Internet Cookies <i>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.</i>	AV		AV		The disposal of Internet cookies need not be documented through destruction authorizations (1.2.001) or in records disposition logs (1.2.010), but agencies should establish procedures governing disposal of these records as part of its records management plan (1.2.014).		
2.2.015	AM02.006	History Files – Web Sites <i>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.</i>	AV		AV		The disposal of history files need not be documented through destruction authorizations (1.2.001) or in records disposition logs (1.2.010), but agencies should establish procedures governing disposal of these records as part of its records management plan (1.2.014).		

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2.2.016	AM02.007	Software Registrations, Warranties and License Agreements	LA +3		LA+3				
		RESEARCH							
	AN01.001	Occupational Needs Assessments and Research Assistance	AV		AV	R			
1.1.038	AN04.001	Surveys/Questionnaires <i>Surveys returned by the customers or clients of an agency, and the statistical data maintained rating an agency's performance. Graduate Survey, Employer Surveys</i>	AC+3		AC+3		AC = Final disposition of summary report. SEE item number 1.1.067 for summary reports compiled from customer surveys.		
	AN04.002	Statistical Reports (SPSS)	3		3	R			
	AN05.000	Institutional Research Projects <i>Student Characteristic Studies,</i>	3		3	R			

Retention Codes (Field 7)				Archival Codes (Field 8)			
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		<i>Demographic Studies, Economic Studies, Graduate Placement Studies, Cost Studies, Salary Studies, Funding Formula Studies, Performance-Based Funding Studies, Appropriations Request Projects, Carl D. Perkins Act Studies, Studies of Statewide Tech. Educ.</i>							
		STUDENT RECORDS							
	AO01.000	Prospects Who Do Not Enter <i>Acceptance letters, advanced placement records, application for admission, correspondence, entrance examination reports (DAT), letters of recommendation, medical records, placement scores, readmission forms, recruitment materials, test scores, transcripts from other colleges, transcripts from high school.</i>	AC+1		AC+1		AC = End of Admission Term.		

Retention Codes (Field 7)				Archival Codes (Field 8)			
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			Agency	Storage	Total					

	AO02.000	Admissions Data/Documents <i>Acceptance letters, application for admission, correspondence, medical/dental records, residency classification, test scores, ability to benefit, admission/parolees and admission/probation. Student Background checks.</i>	AC+3		AC+3		AC = Graduation or Last Day of Attendance CAUTION: Student records may only be reviewed by TSTC officials in accordance with the Family Educational Records and Privacy Act (FERPA).		
	AO02.001	Admission and Assessment Records <i>Advanced placement records; transcripts, other colleges and high school.</i>	PM		PM				

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AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist					



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	AO03.000	Registration and Records Data/Documents <i>Disciplinary records, application for graduation, add/drop/withdrawal authorizations, credit by exam, change of major, foreign student documents, grade reports (Registrar's copy), name/address change authorizations, transcript requests, transfer of credit authorizations, incomplete (IP) grade contract, parking form, course substitution authorizations.</i> <i>Corporate College Records: class rosters, registration forms, class lists, and similar records associated with preparation and registration for courses.</i>	AC+3		AC+3	AC = Graduation or Last Day of Attendance		
	AO03.001	Graduation Lists	PM		PM			

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	AO03.002	Grade and Course Credit Records <i>Grade sheets submitted by instructors, grade change documentation, advanced credit posting authorizations, grade rolls or similar input documentation used in posting grade or credit data to transcripts.</i>	AC+5		AC+5	AC = End of academic term		
	AO03.003	Grade Books/Reports <i>Faculty grade books, copies of grades reports provided to students. Assignments, tests and other papers not returned to students.</i>	AC+1		AC+1	AC = End of academic term.		
	AO03.004	Grade Appeals/Change Requests	AC+1		AC+1	AC = After decision on change.		
	AO04.001	Enrollment Verifications Authorizations	AC+3		AC+3	AC = Date of Verification		
	AO04.005	Veterans Administration Certifications <i>VA Forms</i>	AC+3		AC+3	AC = Termination of Enrollment 38 CFR 21.4209(f) <i>Marshall's records are paper.</i>		

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	AO05.000	Statistical Data And Institutional Reports <i>Degree, Enrollment, Grade, Racial/Ethnic Statistics and Schedule of Classes</i>	PM		PM		<i>CAUTION: Grade Statistics data/reports are confidential records.</i>		
	AO06.001	Access to Information Records <i>Includes Requests for formal hearings, Requests and disclosures of personally identifiable information and Student statements on content of records regarding hearings panel decisions.</i>	2		2				
	AO06.003	Student Requests for Nondisclosure/Consent of Directory Information	PM		PM				
	AO06.005	Written Decisions of Hearing Panels	3		3				
	AO07.000	Grievances	AC+3		AC+3		AC=Final decision on the grievance of the student.		

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PUBLICATIONS									
1.3.001	AP01.000	Books/Catalogs/Directories/ Magazines/Newsletters <i>(TSTC) – Record Copy</i>	PM		PM		Required copies sent to Texas State Publications Depository Program, TSLAC		
	AP01.002	Brochures <i>(TSTC) – Record Copy</i>	PM		PM	A			
1.3.002	AP02.000	Publication Development Files <i>Background material, copy (drafts), original artwork, photo negatives, prints, flats, etc. This includes all work performed both inside and outside the agency.</i>	AV		AV	R			
	AP03.000	Commencement Program	PM		PM				
LIBRARY									

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	AQ02.000	Library Circulation Records <i>Data compiled to track the circulation of reading materials.</i>	AV		AV				
		RECORDS MANAGEMENT							
	AR02.001	Performance Evaluations Site visits	2		2				
1.2.005	AR03.001	Approved Retention Schedule (SLR105) <i>Amendments to TSTC Records Retention Schedule Agency copy, Formerly RMD 105. Includes documentation of certification and approval – forms SLR 105C (formerly RMD 105C) and/or other forms designated by the State Records Administrator.</i>	US		US		Original is retained by State and Local Records Management Division, TSLAC.		
1.2.012	AR03.002	Records Inventory	US		US				

Retention Codes (Field 7)						Archival Codes (Field 8)			
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1.2.006	AR03.005	Records Transmittal Forms <i>Forms indicate records transferred to storage or a transfer of legal custody.</i>	AC+2		AC+2	AC = Date of authorization for destruction, permanent transfer from storage, or transfer to the TSTC Archives by the College Records Manager.		
1.2.013	AR03.006	Records Control Locators Aids <i>Includes indexes, card files, shelf lists, registers, guides, etc.</i>	AC		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.		
1.2.008	AR03.007	Request for Authority to Dispose of State Records (RMD 102) Agency copy <i>Authorization to dispose of records not listed on the TSTC Records Retention Schedule.</i>	FE+3		FE+3	Original is retained by the State and Local Records Management Division, TSLAC.		

Retention Codes (Field 7)				Archival Codes (Field 8)			
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1.1.020	AR05.001	Public Information Requests - Not Exempted <i>Includes all correspondence and documentation relating to requests for records that are furnished to the public under Public Information Act (Chapter 552, Government Code).</i>	AC+1		AC+1	AC = Date request fulfilled.		
1.1.021	AR05.002	Public Information Requests - Exempted <i>Includes all correspondence and documentation relating to requests for records that are exempt under the Public Information Act (Chapter 552, Government Code).</i>	AC+2		AC+2	AC = Date of notification that records are exempt.		
1.1.072	AR05.003	Public Information Reports <i>Reports made to Office of Attorney General on an agency's Public Information Act activities.</i>	2		2			

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1.2.010	AR07.000	Disposition Log <i>Logs or similar records listing records destroyed or transferred to the Archives, or storage showing records series title, dates of records, and date destroyed or transferred.</i>	10		10	Contact the TSTC Archivist when records have met their retention period.		
1.2.001	AR07.001	Records Destruction Authorizations <i>Agency level documents authorizing final disposition of records under a certified records retention schedule.</i>	FE+3		FE+3			
1.2.003	AR08.000	Forms History File <i>Print masters of original version and all subsequent revisions to an agency form, including any associated design or design modification requests.</i>	AC+1		AC+1	AC = Discontinuance of use of form.		

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1.2.004	AR08.001	Forms Inventory <i>Any periodic listing of all forms used internally or externally by an agency.</i>	US		US				
		STUDENT SERVICES							
	AS01.001	Application and Award Records <i>Including any supporting documentations</i>	AC+4		AC+4		AC = End of award year.		
	AS01.001.1	Financial Aid Documentation of Recipients <i>Federal/State/local grant programs, Scholarship, Loans and Work Study Programs</i>	AC+3		AC+3		AC = End of the period for which the loan was intended or End of award year. 34 CFR 668.24		
	AS01.002	Records of those who applied but did not receive Financial Aid	AC+1		AC+1		AC = End of academic period for which aid denied.		

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	AS01.003	Financial Aid Disbursement and Repayment Records <i>Federal/State/Local grant programs, scholarship, loan and work-study</i>	AC+3		AC+3		AC = End of academic period or period for which aid denied. 34 CFR 668.24		
	AS01.004	Tuition Exemption Records (Waivers)	FE+3		FE+3		Applications for and supporting documentation evidencing the grant of tuition exemptions or remissions.		
	AS02.000	Clubs, Organizations and Sports	AV		AV	R			
	AS03.000	Counseling Regulation Records <i>Vocational (Degree Plan), graduation, requirements for federal/state, Disease/drug education, personal life, insurance and wellness/fitness program.</i>	AC+3		AC+3	R	AC = Termination of program, rules, policies, or procedures.		

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	AS04.000	Special Student Services Records <i>Handicapped, Non-Traditional, Veterans, Foreign Students, Job Placement, Orientation, Career Planning and Placement and Retention.</i> <i>Includes: Textbook Loan Program, Transportation Assistance, Child Care Assistance, Graduate Placement Records</i>	AC+3		AC+3	R	AC = Termination of program, rules, policies, or procedures.		
		TRAVEL							
3.3.023	AT01.000	Travel Requests – State or Federal <i>Employee and Students travel.</i>	FE+5		FE+5				
	AT02.000	Travel Requests (No Reimbursement) <i>Employee and Student travel.</i>	FE+3		FE+3				

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LEGAL									
1.1.014	AU01.000	Legal Opinions and Advice <i>From agency legal counsel or the Attorney General, including any requests eliciting the opinions. Includes: Requests for Legal Opinions/Advise from Attorney General/General Counsel (Requests for public information decision).</i>	AV		AV	R	Contact Records Manager for review before destruction in case of Destruction Hold on records.		
1.1	AU01.002	Court Rulings	AV		AV				
1.1.048	AU02.000	Litigation <i>Records created by or on behalf of an agency in anticipation of or in the adjudication of a lawsuit.</i>	AC+1		AC+1	R	AC = As applicable, decision 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		

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							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.		
1.1	AU03.000	Employee/Student Legalities and Policies <i>TSTC General Counsel review records on Federal/State rules, regulations, policies and procedures which apply to TSTC. Includes: Special/Traditional Student, Support Staff, and Faculty.</i>	AC+3		AC+3	R	AC = Termination of program, rules, policies, or procedures.		
		POLICE DEPARTMENT							
	AV01.001	Minor Incident Report (Form - I), Internal Case Disposition	AV		AV				
	AV01.002	Major Case Reports	10		10				
	AV02.000	Motor Vehicle Accidents	AC+2		AC+2		AC = After completion of accident report.		

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	AV02.001	Criminal Trespass Warning	AV		AV			
5.6.009	AV03.000	Parking Permits or Assignments	US		US			
	AV04.001	Justice of Peace Tickets	2		2			
	AV04.002	Student/Employee School Tickets	AC+ 6 mo		AC+ 6 mo	AC = After closed		
	AV06.000	Uniform Crime Report - Monthly	FE+1		FE+1	Also Maintained by Texas Department of Public Safety.		
	AV06.002	Registered Sex Offender Report	PM		PM			
	AV07.000	Caution Inspections <i>Building Discrepancy Notices Provided to building director when lights are left on or rooms unlocked.</i>	AV		AV			
5.2.017	AV08.000	Lost & Stolen Property Reports	FE+3		FE+3			
	AV09.000	Surveillance Tapes	AV		AV			

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		PUBLIC RELATIONS and RECRUITING							
1.1.019	AW00.001	Public Relations Records <i>News, press releases, or any public relations films maintained or issued by an agency. Includes print, electronic, audio, and audiovisual records.</i> <i>Includes News articles about TSTC</i>	2		2	R			
	AW00.002	Advertising (Special Events)	AV		AV				
	AW00.003	Marketing Plan	AC+3		AC+3		AC = Decision to implement or not		
	AW00.004	Graphics	AV		AV				
	AW00.005	College Signage	AV		AV				
	AW00.006	Recruiting Activities	AV		AV				

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