



December 13, 2012

Dr. James Gary
Interim Director, Technology and Information Services
University of Texas System
601 Colorado Street
Austin, TX 78701

RE: University of Texas System
Retention schedule approved for use.

State and Local
Records Management

Dear Dr. Gary:

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 Please ensure all old copies of the schedule are superseded with this recertified copy.

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

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

4400 Shoal Creek Blvd.
Austin, Texas
78756

During a certification period, state regulations (13 TAC §6.4) also require the submission of amendments to the retention schedule as needed to keep the information in the schedule current. If you are not familiar with the amendment process, contact the government information analyst assigned to your agency.

www.tsl.state.tx.us

Commission Chairman
Michael C. Waters

Your efforts in maintaining an up-to-date records retention schedule are appreciated. It not only helps to ensure the integrity of your recordkeeping practices, but it is also essential to the success of your records management program. Your schedule will be due for recertification on the last working day of December 2015. If you have any questions, call the information analyst assigned to your agency, Erica Wilson, at 512-463-6627.

Members
Sharon T. Carr
Martha Doxy Freeman
F. Lynwood Givens
Larry G. Holt
Wm. Scott McAfee
Sandra J. Pickett

Sincerely,

Craig Kelso
Director and State Records Administrator

Director and Librarian
Peggy D. Rudd

Assistant State Librarian
Edward Seidenberg

Enclosure
cc: State Auditor, State Archivist
cc: (without enclosure) Francisco G. Cigarroa

*Preserving yesterday,
informing today,
inspiring tomorrow.*

R01-720/720

EW



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 720
Agency Name University of Texas System Administration

(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 *Sheila B Ochner*
Name *(Print or type)* Sheila Ochner
Date 2/28/12

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 *Peggy D. Rudd*
Name *(Print or type)* Peggy D. Rudd
Date 12/11/12

Cert/Recert No. 6 Amendment No. —

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.





SLR 105

Form SLR 105C must accompany this form.

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STATE OF TEXAS Records Retention Schedule

2. Agency Code 720		3. Agency Name UNIVERSITY OF TEXAS SYSTEM ADMINISTRATION							
	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			

1.1.007	ALL2142	CORRESPONDENCE - EXECUTIVE	AC+4	0	AC+4	O	AC=End of term or service in agency.		
1.1.008	ALL1798	CORRESPONDENCE - NON-EXECUTIVE	AC+2	0	AC+2	-	AC=Send or receipt date.		
1.1.010	ALL1800	OFFICE PROCEDURES AND DIRECTIVES - INTERNAL	US+1	0	US+1	-			
1.1.013	ALL1801	CALENDARS, APPOINTMENTS, ITINERARIES - NON-EXECUTIVE	CE+1	0	CE+1	-			
1.1.013	ALL2143	CALENDARS, APPOINTMENTS, ITINERARIES - EXECUTIVE	AC+1	0	AC+1	O	AC=End of term or service in agency. 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.		
1.1.023	ALL1827	ORGANIZATION CHARTS	US	0	US	I			
1.1.024	ALL1828	PLANS AND PLANNING RECORDS	AC+3	0	AC+3	O	AC=Decision made to implement or not to implement result of planning process. Some of these records may be confidential.		
1.1.040	ALL1831	SPEECHES, PAPERS, AND PRESENTATIONS	AC	0	AC	O	AC=End of term or service in agency.		

Retention Codes (Field 7) AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value CE – Calendar Year End FE – Fiscal Year End LA – Life of Asset MO – Months PM – Permanent US – Until Superseded	Archival Codes (Field 8) I – Transfer to Archives O – Review by Archivist
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1.1.057	ALL1835	TRANSITORY INFORMATION	AC	0	AC	-	AC=Purpose of record has been fulfilled		
1.1.063	ALL1837	STAFF MEETING MINUTES AND NOTES	FE+1	0	FE+1	-			
1.1.064	ALL1838	AGENCY PERFORMANCE MEASURES DOCUMENTATION	FE+3	0	FE+3	-	This series trumps any series with a shorter retention that is used for performance measure of an agency.		
1.1.067	ALL1840	REPORTS AND STUDIES (NON-FISCAL)	FE+3	0	FE+3	O			
1.1.069	ALL1943	REPORTS - ACTIVITY	FE+1	0	FE+1	-			
1.1.070	ALL1829	RULES, POLICIES, PROCEDURES - SYSTEM PROGRAMS AND SERVICES	AC+3	0	AC+3	O	AC=End of need for rule, policy, or procedure.		
1.2.014	ALL1940	RECORDS MANAGEMENT PLANS AND GUIDES	US+1	0	US+1	-	Disaster Recovery Plans are vital records.		
2.2.016	ALL1941	SOFTWARE REGISTRATIONS, WARRANTIES AND LICENSE AGREEMENT	LA+3	0	LA+3	-			
5.2.010	ALL1942	EQUIPMENT MANUALS	LA	0	LA	-			
3.3.030	ALL1843	TRAINING - MATERIALS AND ADMINISTRATIVE RECORDS	US+2	0	US+2	-	Caution: Does not include hazardous materials training records which must be kept 5 years - Texas Health and Safety Code, 502.009(g).		
3.4.006	ALL1844	TIME AND LEAVE RECORDS	FE+4	0	FE+4	-	40 TAC 815.106(i)		

Retention Codes (Field 7)				Archival Codes (Field 8)	
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4.1.005	ALL2144	INVENTORY & OTHER COST FILES - PRODUCTION, JOB, LABOR, QUOTES, PRICING, SPECIFICATIONS, ETC.	FE+3	0	FE+3	-		
4.1.006	ALL2160	INVESTMENT RECORDS	AC	20	AC+20	-	AC=After reconciliation of transaction.	92-720-021
4.2.005	ALL1848	PURCHASES AND EXPENDITURE RECORDS	FE+3	0	FE+3	-	Does not include purchases or expenditures related to grant records, which must be kept with the grant records for the period of time required by the grant.	
4.5.002	ALL1849	INTERNAL FISCAL MANAGEMENT REPORTS	FE+3	0	FE+3	-		
4.6.002	ALL1851	ACCOUNT RECONCILIATIONS	FE+3	0	FE+3	-		
1.2.010	ALL1944	RECORDS DISPOSITION LOGS	10	0	10	-		
5.1.001	ALL1953	CONTRACTS AND LEASES	AC+4	0	AC+4	-	AC=Expiration or termination of the instrument according to its terms. SEE item number 5.2.028 for building construction contracts and item number 5.1.017 for contract logs.	
5.1.017	ALL1933	LOGS AND TRACKING RECORDS - CONTRACTS, CORRESPONDENCE, ETC.	FE+3	0	FE+3	-		
1.1.000	ACA1178	DEGREE PROGRAMS	AC+1	0	AC+1	-	AC=After approval by department head	

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1.1.000	ACA12	CHRONOLOGICAL ADMINISTRATIVE RECORDS	AC	20	AC+20	-	AC=End of term	93-720-042	
1.1.000	ACA1756	APPOINTMENTS BY GOVERNOR	FE+1	0	FE+1	O			
1.1.063	ACA1954	MEETING NOTES - ADVISORY COUNCILS	FE+2	0	FE+2	-			
1.1.063	ACA1955	MEETING NOTES - COUNCIL OF ACADEMIC INSTITUTIONS	FE+2	0	FE+2	-			
1.2.012	ACA2005	RECORDS INVENTORY WORKSHEETS	US	0	US	-			
2.1.011	ACA1179	FINDING AIDS, INDEXES, AND TRACKING SYSTEMS	AC	0	AC	-	AC=The related hard copy or electronic records have been destroyed. CAUTION: These records must carry the same retention period and archival code of the records they support.		
3.1.014	ACA1956	PRESIDENTIAL SEARCH COMMITTEE RECORDS	AC+2	0	AC+2	-	AC=When applicant accepts or declines the position. 29 CFR 1602.49(a). CAUTION: Does not include criminal history checks. SEE item number 3.1.026.		
3.3.020	ACA2006	WORK SCHEDULES/ASSIGNMENTS	FE+1	0	FE+1	-			
3.3.023	ACA2007	REIMBURSABLE ACTIVITIES, REQUESTS AND AUTHORIZATIONS TO ENGAGE IN	FE+3	0	FE+3	-			

Retention Codes (Field 7)				Archival Codes (Field 8)			
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3.4.004	ACA2008	OVERTIME AUTHORIZATIONS	FE+2	0	FE+2	-		
4.7.012	ACA2009	SIGNATURE AUTHORIZATIONS	AC+3	0	AC+3	-	AC=The end of the fiscal year in which the signature authorization is superseded.	
5.6.002	ACA1759	AIRPLANE PASSENGER LISTS	FE+3	0	FE+3	-		
1.1.002	AUD1960	AUDITS	AC+7	0	AC+7	-	AC=Publication or release of final audit findings.	
1.1.002	AUD1961	AUDITS - INTERNAL AUDIT COMMITTEE PACKETS	AC+25	0	AC+25	-	AC=Publication or release of final audit findings.	
1.1.002	AUD1962	AUDITS - PEER REVIEWS	AC+10	0	AC+10	-	AC=Publication or release of final audit findings.	
3.1.019	AUD1958	PERFORMANCE APPRAISALS	FE+2	0	FE+2	-	29 CFR 1620.32(c)	
5.1.004	AUD1959	MAIL AND TELECOMMUNICATIONS LISTINGS	US	0	US	-		
1.1.059	BOR1976	MEETINGS, CERTIFIED AGENDAS, OR TAPE RECORDINGS OF CLOSED	AC+2	0	AC+2	-	AC=The date of the meeting or completion of pending action involving the meeting, whichever is later. Government Code, 551.104(a). SEE caution comment under 1.1.058.	
1.1.007	BOR1977	CORRESPONDENCE - ADMINISTRATIVE	AC+1	0	AC+1	I	AC=Term of office, but not less than 4 years.	
1.1.007	BOR1978	CORRESPONDENCE - ADMINISTRATIVE REGENTAL	PM	0	PM	I		

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1.1.060	BOR1979	MEETINGS, AUDIO OR VIDEOTAPES OF OPEN	AC+90 Days	0	AC+90 Days	-	AC = Official Approval of written minutes of the meeting by the governing body of an agency.		
1.1.024	BOR2049	EVENT PLANNING RECORDS	AC+3	0	AC+3	O	AC=Event date.		
1.1.058	BOR2117	MEETING AGENDA AND MINUTES	PM	0	PM	I	ARCHIVES NOTE: Agency retains permanent record copy. The archival requirement will be et by sending a copy to the University of Texas at Austin Archive.		
1.1.062	BOR1247	MEETINGS - SUPPORTING DOCUMENTATION	PM	0	PM	I			
1.1.066	BOR1963	REPORTS - BIENNIAL OR ANNUAL AGENCY (NARRATIVE)	AC+6	0	AC+6	I	AC=September 1 of odd-numbered calendar years. Sending a copy to the Texas State Publications Depository satisfies the archival requirement.		
1.1.068	BOR1964	REPORTS ON PERFORMANCE MEASURES	AC+6	0	AC+6	-	AC=September 1 of odd-numbered calendar years		
1.1.070	BOR1866	RULES, POLICIES, AND PROCEDURES - FINAL	PM	0	PM	I			
1.2.013	BOR2080	RECORDS CONTROL LOCATOR AIDS	AC	0	AC	-	AC=Until superseded or no longer needed		
3.1.013	BOR1965	EMPLOYMENT CONTRACTS	AC+4	0	AC+4	-	AC=Expiration or termination of the contract according to its terms.		

Retention Codes (Field 7)				Archival Codes (Field 8)	
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		Agency	Storage	Total	9. Remarks			

3.1.014	BOR1975	CHANCELLOR AND PRESIDENTIAL SEARCH COMMITTEE RECORDS	AC+2	0	AC+2	-	AC=Candidate accepts or declines position. 29 CFR 1602.49(a). CAUTION: Does not include criminal history checks. SEE item number 3.1.026.		
3.1.027	BOR1966	TRAINING AND EDUCATIONAL ACHIEVEMENT RECORDS	AC+5	0	AC+5	-	AC=Termination of employment.		
3.1.034	BOR1967	RESUMES-UNSOLICITED	AV	0	AV	-	SEE item number 3.1.014 for resumes, whether solicited or unsolicited, that are used in any way in the employment selection process.		
3.1.038	BOR1969	PUBLIC ACCESS OPTION FORM	US	0	US	-	SEE item number 3.3.011.		
3.3.025	BOR1968	JOB PROCEDURE RECORDS	US+3	0	US+3	-			
3.4.006	BOR2081	TIME SHEETS - STUDENT WORKERS	FE+4	0	FE+4	-	40 TAC 815.106(i).		
4.2.007	BOR1238	EXPENDITURE VOUCHERS	AC	0	AC	-	AC=FE + 3 or term of regent, whichever is longer.		
5.1.004	BOR1970	MAIL AND TELECOMMUNICATIONS LISTINGS	US	0	US	-			
5.1.005	BOR1974	POSTAGE RECORDS	FE+3	0	FE+3	-			
5.2.002	BOR1971	BUILDING CONSTRUCTION PROJECT FILES	AC+10	0	AC+10	O	AC=Completion of project.		

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5.3.007	BOR1973	BID DOCUMENTATION	FE+3	0	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.		
1.1.000	CHA1269	FINANCIAL DISCLOSURE AND CONFLICT OF INTEREST AFFIDAVITS	FE+3	0	FE+3	-			
1.1.069	CHA2145	PROJECT MANAGEMENT TRACKING SYSTEM	AC+3	0	AC+3	-	AC=Project completed.		
3.1.019	CHA2144	EXECUTIVE OFFICER PERFORMANCE - WORKPLANS AND APPRAISALS	FE+3	0	FE+3	-	29 CFR 1620.32(c)		
1.1.063	SCM2047	STAFF MEETING MINUTES AND NOTES	1	0	1	-			
1.1.067	SCM2013	REPORTS AND STUDIES (NON-FISCAL)	AC+3	0	AC+3	O	AC=End of fiscal year in which report findings are published or released.		

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1.1.071	SCM2015	AGENCY RULES, POLICIES, AND PROCEDURES - WORKING FILES	AC+3	0	AC+3	O	AC=Completion or termination of program, rules, policies or procedures. See also item number 1.1.070. All official record copies of policy documents are held by the Policy Office. Only working papers are held in each office/department.		
5.4.000	SCM1649	RISK ASSESSMENT AND MONITORING PLANS	US+5	0	US+5	-			
1.1.066	CON1737	REPORTS - BIENNIAL OR ANNUAL AGENCY (NARRATIVE)	AC+6	0	AC+6	I	AC=September 1 of odd-numbered calendar years. Archives Note: the archival requirement is met by sending the required copies of the reports to the Texas State Publications Depository Program, Texas State Library and Archives Commission.		
3.2.002	APS1215	EMPLOYEE EARNINGS RECORDS	FE+4	0	FE+4	-	40 TAC 815.106(i).		
4.2.001	APS1218	CASH DEPOSIT VOUCHERS	FE+3	0	FE+3	-			
4.2.006	APS1219	GENERAL JOURNAL VOUCHERS	FE+3	0	FE+3	-			
4.7.012	APS1214	SIGNATURE AUTHORIZATIONS	AC+3	0	AC+3	-	AC=The end of the fiscal year in which the signature authorization is superseded.		

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5.1.005	APS1743	POSTAGE RECORDS	FE+3	0	FE+3	-			
5.2.014	APS1220	INVENTORY-ANNUAL PHYSICAL	FE+3	0	FE+3	-			
1.1.000	CON1282	REQUESTS FOR BUDGET CHANGES	FE+3	0	FE+3	-			
1.1.004	CON1285	LEGISLATIVE APPROPRIATION REQUESTS	FE+50	0	FE+50	I	Budget Office is the source of information for system and institutional inquiries. ARCHIVES NOTE: Agency retains permanent record copy. The archival requirement is met by sending the required copies of the requests to the Texas State Publications Depository Program, Texas State Library. Only copies of supporting documentation submitted to the Legislative Budget Board are archival.		
3.1.013	CON1782	EMPLOYMENT CONTRACTS	AC+7	0	AC+7	-	AC=Termination of employment of Chief Administrative Officer. These contracts are for Chief Administrative Officers.		
3.2.003	CON1273	FEDERAL TAX RECORDS	AC+23	0	AC+23	-	AC=Tax due date, date claim is filed, or date tax is paid whichever is later 26 CFR 31.6001-1(e)(2).		
4.2.000	CON1289	ACCOUNTING VOUCHERS	FE+3	0	FE+3	-			

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4.5.000	CON1275	SYSTEM ADMINISTRATION POSTED BUDGETS	FE+50	0	FE+50	I			
4.5.001	CON1274	WORKSHEETS FOR PREPARING FISCAL REPORTS	FE+9	0	FE+9	-			
4.5.001	CON1283	WORKPAPERS - BUDGET	FE+3	0	FE+3	-			
4.5.002	CON1278	INTERNAL FISCAL MANAGEMENT REPORTS	PM	PM	PM	I	Includes Annual Financial Reports.	95-720-058	
4.5.006	CON1280	ANNUAL OPERATING BUDGETS	FE+50	0	FE+50	O	Required by the General Appropriations Act. Budget Office is the source of historical information for system and institutional inquiries. ARCHIVES NOTE: Records identified as archival will be transferred to the University Archives maintained at the Center for American History. When records have met their retention, contact the Records Manager to schedule transfer of records.		
5.6.001	TRA1739	AIRPLANE FLIGHT LOGS	LA+3	0	LA+3	-	Records are maintained by the office of the State Aircraft Pooling Board.		
5.6.002	TRA1738	AIRPLANE PASSENGER LISTS	FE+3	0	FE+3	-			
1.1.019	ECM2108	PUBLIC RELATIONS RECORDS	FE+5	0	FE+5	O			

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		Agency	Storage	Total					

1.3.002	ECM2109	PUBLICATION DEVELOPMENT FILES	AV	0	AV	O			
1.1.000	GPS1772	DONOR RECORDS	AC+5	0	AC+5	O	AC=Expiration or termination of the instrument according to its terms.		
1.1.000	GPS1776	CHANCELLOR'S COUNCIL MEMBERSHIP LIST	US	0	US	-			
1.1.000	GPS1777	BUILDING NAMING INVENTORY	FE+10	0	FE+10	O			
1.2.012	GPS2017	RECORDS INVENTORY WORKSHEETS	US	0	US	-			
3.2.003	GPS1753	FEDERAL TAX RECORDS	AC+4	0	AC+4	-	AC=Tax due date, date claim is filed, or date tax is paid whichever is later. 26 CFR 31.6001-1(e)(2).		
4.2.001	GPS2004	CASH DEPOSIT VOUCHERS	FE+3	0	FE+3	-			
4.7.002	GPS1588	BANK STATEMENTS	FE+5	0	FE+5	-			
4.7.004	GPS1575	ESTATES OR ASSETS HELD IN TRUST BY OTHERS	LA+10	0	LA+10	-			
4.7.004	GPS1576	ENDOWMENTS - PERPETUAL OR TERM	LA+5	0	LA+5	-			
4.7.004	GPS1578	CHARITABLE TRUSTS/ POOLED INCOME FUND/ REMAINDER INTERSTS IN LIFE ESTATES	LA+5	0	LA+5	-			
4.7.004	GPS1583	CAPITAL ASSET RECORDS - PROPOSED, CONTINGENT AND REVOCABLE FILES	AC+3	0	AC+3	-	AC=After determination of gift status.		
4.7.004	GPS2106	CAPITAL ASSET RECORDS - CURRENT PURPOSE GIFTS	LA+5	0	LA+5	-			

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 720		3. Agency Name UNIVERSITY OF TEXAS SYSTEM ADMINISTRATION							
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		Agency	Storage	Total		9. Remarks			

1.1.019	OPA1685	PUBLIC RELATIONS RECORDS	FE+5	0	FE+5	O			
1.3.002	OPA1678	PUBLICATION DEVELOPMENT FILES	AV	0	AV	O			
1.1.000	SPE1555	OFFICIAL OCCASION RECORDS	FE+5	0	FE+5	-			
1.3.002	SPE2020	PUBLICATION DEVELOPMENT FILES	AV	0	AV	O			
1.1.020	FED1823	PUBLIC INFORMATION REQUESTS - NOT EXEMPTED	AC+1	0	AC+1	-	AC=Date request fulfilled.		
1.1.021	FED1824	PUBLIC INFORMATION REQUESTS - EXEMPTED	AC+2	0	AC+2	-	AC=Date of notification that records are exempt.		
4.5.005	FED1850	EXTERNAL FISCAL REPORTS	FE+3	0	FE+3	-			
4.5.001	FIN2028	WORKSHEETS FOR PREPARING FISCAL REPORTS	FE+3	0	FE+3	-			
4.7.010	FIN2025	LONG-TERM LIABILITY RECORDS	AC+3	0	AC+3	-	AC=Retirement of Debt; Bonds have been paid in full and presented to UT System Administration.		
5.3.009	FIN2027	REQUESTS FOR INFORMATION	AC	0	AC	-	AC=Date of direct purchase, issuance of request for bids, or decision not to proceed with the procurement, as applicable.		
1.1.058	HEA1344	MEETING AGENDA AND MINUTES - COUNCIL OF HEALTH INSTITUTIONS	AC+10	0	AC+10	I	AC=When Agenda and Minutes and Finalized. ARCHIVES NOTE: Not a governmental body as defined by Government Code Chapter 551.		

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 720		3. Agency Name UNIVERSITY OF TEXAS SYSTEM ADMINISTRATION							
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		Agency	Storage	Total	9. Remarks				

3.1.000	HEA2161	PERSONNEL FILES - HEALTH INSTITUTION PRESIDENTS	AC+5	0	AC+5	-	AC=Termination of employment.		
3.1.014	HEA2116	PRESIDENTIAL SEARCH COMMITTEE RECORDS - HEALTH INSTITUTIONS	AC+2	0	AC+2	-	AC=When applicant accepts or declines the position. 29 CFR 1602.49(a). CAUTION: Does not include criminal history checks. SEE item number 3.1.026.		
3.3.023	HEA1982	REIMBURSABLE ACTIVITIES, REQUESTS AND AUTHORIZATIONS TO ENGAGE IN	FE+3	0	FE+3	-			
4.1.001	HEA1985	ACCOUNTS PAYABLE INFORMATION	FE+3	0	FE+3	-			
4.1.007	HEA1986	TRANSFERS OR BUDGET REVISIONS	FE+3	0	FE+3	-			
4.4.002	HEA1987	ACCOUNTS RECEIVABLE LEDGERS	FE+3	0	FE+3	-			
4.4.003	HEA1988	ACCOUNTS PAYABLE LEDGERS	FE+3	0	FE+3	-			
4.7.007	HEA1992	DETAIL CHART OF ACCOUNTS	FE+3	0	FE+3	-			
5.1.004	HEA1993	MAIL AND TELECOMMUNICATIONS LISTINGS	US	0	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	
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist	



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1.1.066	HUB1261	REPORTS - BIENNIAL OR ANNUAL AGENCY (NARRATIVE)	AC+15	0	AC+15	I	AC=September 1 of odd-numbered calendar years. ARCHIVES NOTE: The archival requirement is met by sending the required copies of the reports to the Texas State Publications Depository Program, Texas State Library and Archives commission.		
1.1.010	ISPA2083	DIRECTIVES	US+10	0	US+10	-			
1.1.019	ISPA2029	PUBLIC RELATIONS RECORDS	FE+10	0	FE+10	O			
1.1.024	ISPA2085	PLANS AND PLANNING RECORDS	AC+10	0	AC+10	O	AC=Decision made to implement or not to implement result of planning process.		
1.1.065	ISPA2086	REPORTS AND STUDIES (NON-FISCAL) - RAW DATA	AV	0	AV	-			
1.1.067	ISPA2087	REPORTS AND STUDIES (NON-FISCAL)	FE+10	0	FE+10	O			
1.2.012	ISPA2030	RECORDS INVENTORY WORKSHEETS	US	0	US	-			
1.3.002	ISPA2031	PUBLICATION DEVELOPMENT FILES	AV	0	AV	O			

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



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			Agency	Storage	Total	9. Remarks			

2.1.001	ISPA2032	PROCESSING FILES	AC+10	0	AC+10	-	AC=Completion of 3rd verification cycle, or audit completion confirming successful transaction processing, or required audit trail maintenance, or the ability to restore or migrate when errors are detected or when hardware or software changes occur.		
2.1.002	ISPA2033	MASTER FILES	AC+10	0	AC+10	-	AC=Completion of 3rd verification cycle, or audit completion confirming successful transaction updates, or required audit trail maintenance, or the ability to restore or migrate when errors are detected or when hardware or software changes occur.		
2.1.011	ISPA2034	FINDING AIDS, INDEXES, AND TRACKING SYSTEMS	AC+10	0	AC+10	-	AC=The related records have been destroyed. CAUTION: These records must carry the same retention period and archival code of the records they support.		
4.7.007	ISPA2035	DETAIL CHART OF ACCOUNTS	FE+3	0	FE+3	-			
1.1.000	MED1462	STATUS REPORTS AND APPLICANTS MATERIAL FOR ADMISSION TO MEDICAL AND DENTAL SCHOOLS	US	0	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	R – Review by State Archivist
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded		



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		Agency	Storage	Total	9. Remarks			

1.1.000	MED1463	STUDENT APPLICATIONS TO MEDICAL AND DENTAL SCHOOLS	FE+3	7	FE+10	-	Microfilming discontinued in 2003. Master microfilm stored at State Records Center Records after 2003 stored in FileNet.	92-720-022	
3.3.025	MED2094	JOB PROCEDURE RECORDS	US+3	0	US+3	-			
3.4.004	MED2096	OVERTIME AUTHORIZATIONS	FE+2	0	FE+2	-			
4.2.001	MED2097	CASH DEPOSIT VOUCHERS	FE+3	0	FE+3	-			
5.1.001	MED1460	JOINT ADMISSION MEDICAL PROGRAM (JAMP) APPLICATIONS AND STUDENT CONTRACTS - MEDICAL SCHOOLS	AC+4	0	AC+4	-	AC=Expiration or termination of the instrument according to its terms.		
5.1.004	MED2099	MAIL AND TELECOMMUNICATIONS LISTINGS	US	0	US	-			
5.1.007	MED2100	REQUISITIONS FOR IN-AGENCY/INTER-AGENCY COPY/PRINTING SERVICE	AV	0	AV	-			
5.2.014	MED2101	INVENTORY-ANNUAL PHYSICAL	FE+3	0	FE+3	-			
5.2.015	MED2102	INVENTORY, NOTICES OF EQUIPMENT REMOVED FROM	FE+3	0	FE+3	-			
5.3.004	MED2105	ORDER - ACKNOWLEDGMENTS	AV	0	AV	-			
5.3.005	MED2103	PACKING SLIPS	AV	0	AV	-			

Retention Codes (Field 7)				Archival Codes (Field 8)	
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5.3.007	MED2104	BID DOCUMENTATION	FE+3	0	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.		
1.1.000	OEB1307	CONTRACTED CARRIER CORRESPONDENCE AND REPORTS	FE+7	0	FE+7	-			
1.1.038	OEB1494	SURVEYS-EMPLOYEE BENEFITS	AC+3	0	AC+3	-	AC=Final disposition of summary report.		
1.1.065	OEB2148	EMPLOYEE BENEFITS MEMBERS ISSUES	AC+2	0	AC+2	-	AC=Resolution of issue.		
1.3.000	OEB2149	EMPLOYEE INSURANCE AND RETIREMENT EMPLOYEE REFERENCE MATERIALS	AC	0	AC	-	AC=Until superseded or obsolete.		
2.1.002	OEB2150	EMPLOYEE BENEFITS SOFTWARE MASTER FILES	AC+1	0	AC+1	-	AC=Completion of upgrade, migration, or verification of audit trail.		
2.1.002	OEB2151	EMPLOYEE BENEFITS SOFTWARE DATABASE FILES	AC+20	0	AC+20	-	AC=Completion of upgrade, migration, or verification of audit trail.		

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				

2.2.011	OEB1304	EMPLOYEE BENEFITS DATA ENTRY LOGS	AC	0	AC	-	AC=When reconciliation confirmed.		
3.1.000	OEB2152	EMPLOYEE BENEFITS MANDATED BENEFITS COORDINATION AND SECONDARY PAYEE CLAIMS	AC+7	0	AC+7	-	AC=Resolution of claim.		
3.1.000	OEB2153	RETIREMENT LOAN INFORMATION	AC	0	AC	-	AC=After loan has been paid.		
3.1.000	OEB2154	EMPLOYEE BENEFITS MEDICARE RECORDS	AC+6	0	AC+6	-	AC=Resolution of claim.		
3.1.011	OEB1314	EMPLOYEE INSURANCE RECORDS	AC+3	0	AC+3	-	AC=Until superseded.		
3.3.000	OEB1316	INSURANCE CONTRACTS	AC+15	0	AC+15	-	AC=End of contract.		
3.3.004	OEB1492	RETIREMENT PLAN DOCUMENTS	US+1	0	US+1	-	29 CFR 1627.3(b)(2).		
4.2.007	OEB2155	EMPLOYEE BENEFITS PROCARD AND EXPENDITURE VOUCHERS	FE+7	0	FE+7	-			
4.5.002	OEB1309	FINANCIAL STATEMENTS	FE+7	0	FE+7	-			
4.7.002	OEB1310	BANK STATEMENTS	FE+3	0	FE+3	-			
4.7.005	OEB2156	EMPLOYEE BENEFITS SPECIAL CLAIMS	AC+5	0	AC+5	-	AC=Resolution of claim.		
4.7.005	OEB2157	EMPLOYEE BENEFITS INSURANCE ELECTRONIC MEDICAL CLAIMS	AC+20	0	AC+20	-	AC=Resolution of claim.		
5.1.001	OEB1302	EMPLOYEE BENEFITS INSURANCE CONTRACTS	AC+5	0	AC+5	-	AC=Expiration or termination of instrument.		
5.1.001	OEB2158	LIFE INSURANCE CONTRACTS AND RETIREMENT CONTRACTS	AC+30	0	AC+30	-	AC=Expiration or termination of the instrument according to its terms.		

Retention Codes (Field 7)				Archival Codes (Field 8)	
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2. Agency Code		720		3. Agency Name							UNIVERSITY OF TEXAS SYSTEM ADMINISTRATION		
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		Agency	Storage	Total									

5.2.009	OEB2159	EQUIPMENT INVENTORY DETAIL REPORTS AND FORMS	FE+3	0	FE+3	-			
5.3.007	OEB1311	BID DOCUMENTATION	FE+3	0	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.		
1.1.002	OEB2160	AUDITS	AC+7	0	AC+7	-	AC=Publication or release of final audit findings.		

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	R – Review by State Archivist
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		Agency	Storage	Total	9. Remarks			

2.1.002	OES2068	MASTER FILES	AC	0	AC	-	AC=Completion of 3rd verification cycle, or audit completion confirming successful transaction updates, or required audit trail maintenance, or the ability to restore or migrate when errors are detected or when hardware or software changes occur. CAUTION: Records management officers must be certain before assigning the retention period of AC to agency automated processing files that the files do not fall under records series listed elsewhere.		
3.1.001	OES1787	APPLICATIONS FOR EMPLOYMENT-NOT HIRED	FE+2	0	FE+2	-	29 CFR 1602.49(a).		
3.1.002	OES2050	APPLICATIONS FOR EMPLOYMENT-HIRED	AC+5	0	AC+5	-	AC=Separation or termination of employment.		

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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			Agency	Storage	Total	9. Remarks			

3.1.011	OES2051	EMPLOYEE INSURANCE RECORDS - CURRENT EMPLOYEES	AC+5	0	AC+5	-	AC=Until superseded or separation or termination of employment. CAUTION: Documents that serve as payroll deduction authorizations must be maintained for the retention period prescribed for item number 3.2.001.		
3.1.011	OES2077	EMPLOYEE INSURANCE RECORDS	AC+75	0	AC+75	-	AC=Until superseded or separation or termination of employment. CAUTION: Documents that serve as payroll deduction authorizations must be maintained for the retention period prescribed for item number 3.2.001.		
3.1.011	OES2078	EMPLOYEE INSURANCE RECORDS - RETIRED AND DECEASED EMPLOYEES	AC+150	0	AC+150	-	AC=Until superseded or separation or termination of employment. CAUTION: Documents that serve as payroll deduction authorizations must be maintained for the retention period prescribed for item number 3.2.001.		
3.1.012	OES2052	EMPLOYMENT OPPORTUNITY ANNOUNCEMENTS	FE+2	0	FE+2	-	29 CFR 1602.49(a)		

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



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2. Agency Code	720	3. Agency Name					UNIVERSITY OF TEXAS SYSTEM ADMINISTRATION				
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		Agency	Storage	Total							

3.1.014	OES2076	EMPLOYMENT SELECTION RECORDS	FE+2	0	FE+2	-	29 CFR 1602.49(a). CAUTION: Does not include criminal history checks. SEE item number 3.1.026.		
3.1.029	OES2080	EMPLOYMENT ELIGIBILITY, DOCUMENTATION OR VERIFICATION OF FEDERAL REPORTING FORM (INS I-9)	AC+5	0	AC+5	-	AC = Termination of employment. CAUTION: Federal regulation requires that INS 1-9 forms be retained for 3 years from date of hire or 1 year after separation of the employee, whichever later. Agencies should make certain that the INS I-9 forms for employees who terminate from an agency less than 3 years from date of hire are kept for the 3 year retention period. 8 CFR 274a.2(b)(2)(i)(A) and (c)(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			
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			Agency	Storage	Total	9. Remarks						

3.1.031	OES2081	EMPLOYEE BENEFITS - OTHER THAN INSURANCE	AC+5	0	AC+5	-	AC = Until superseded or termination of employment. CAUTION: Documents that serve as payroll deduction authorizations must be maintained for the retention period prescribed for item number 3.2.001.		
3.2.009	OES2079	STATE DEFERRED COMPENSATION RECORDS	AC+5	0	AC+5	-	AC = All accounts with a vendor or vendors for the individual participant have been closed.		
3.1.018	OES2054	GRIEVANCE RECORDS	AC+2	0	AC+2	-	AC=Final decision on the grievance. CAUTION: Does not include formal complaints filed by an agency employee with the Equal Employment Office (EEO) of the U. S. Department of Labor. SEE item number 1.1.048.		
3.1.019	OES2055	PERFORMANCE APPRAISALS	AC+5	0	AC+5	-	AC=Separation or termination of employment. 29 CFR 1620.32(c).		

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



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						Agency	Storage	Total						9. Remarks	

3.1.020	OES2056	PERSONNEL CORRECTIVE ACTION DOCUMENTATION	AC+5	0	AC+5	-	AC=Separation or termination of employment. 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.		
3.1.021	OES2057	PERSONNEL DISCIPLINARY ACTION DOCUMENTATION	AC+5	0	AC+5	-	AC=Separation or termination of employment.		
3.1.022	OES2058	PERSONNEL INFORMATION OR ACTION FORMS	AC+5	0	AC+5	-	AC=Separation or termination of employment. 29 CFR 1602.49(a).		
3.1.023	OES2059	POSITION /JOB DESCRIPTIONS	AC+5	0	AC+5	-	AC=Until superseded or job eliminated. 40 TAC 815.106(i).		

Retention Codes (Field 7)				Archival Codes (Field 8)	
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				Agency	Storage	Total	9. Remarks										

3.1.026	OES2061	CRIMINAL HISTORY CHECKS - AUTHORIZATION FORMS	AC	0	AC	-	AC=The criminal history record has served the immediate purpose for which it was obtained. CAUTION: An agency that is authorized to obtain a criminal history record information from DPS must refer to its agency's legislation or see Subchapter F, Chapter 411, Government Code for appropriate retention and use of this information.		
3.1.037	OES2062	EMPLOYEE RECOGNITION RECORDS	AC+5	0	AC+5	-	AC=Separation or termination of employment.		
3.1.038	OES2063	PUBLIC ACCESS OPTION FORM	AC+75	0	AC+75	-	AC=Until superseded or separation or termination of employment.		
3.2.001	OES2064	EMPLOYEE DEDUCTION AUTHORIZATIONS	AC+5	0	AC+5	-	AC=Separation or termination of employee or after amendment, expiration, or termination of authorization, whichever sooner.		
3.2.004	OES2065	INCOME ADJUSTMENT AUTHORIZATIONS	AC+5	0	AC+5	-	AC=Separation or termination of employee or after amendment, expiration, or termination of authorization, whichever sooner. 29 CFR 516.6(c)		

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



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Records Retention Schedule

SLR 105

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2. Agency Code 720		3. Agency Name UNIVERSITY OF TEXAS SYSTEM ADMINISTRATION								
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					

3.2.005	OES2066	W-4 FORMS	AC+5	0	AC+5	-	AC=Until superseded, obsolete, or upon separation of employee. 26 CFR 31.6001-1 (e)(2).		
3.2.007	OES1789	UNEMPLOYMENT COMPENSATION RECORDS	AC+5	0	AC+5	-	AC=After closed, terminated, completed, expired or settled.		
3.2.008	OES2067	DIRECT DEPOSIT APPLICATION/AUTHORIZATIONS	AC+5	0	AC+5	-	AC=Separation or termination of employee or after amendment, expiration, or termination of authorization, whichever sooner.		
3.3.001	OES1792	AFFIRMATIVE ACTION PLANS	FE+5	0	FE+5	-	29 CFR 30.8(e) for apprenticeship records.		
3.3.010	OES2069	LABOR STATISTICS REPORTS	FE+3	0	FE+3	-			
3.3.011	OES1853	FORMER EMPLOYEE VERIFICATION RECORDS	AC+75	0	AC+75	-	AC=Separation or termination of employment.		
3.3.015	OES2070	POSITIONS/JOB CLASSIFICATION REVIEW FILE	US+3	0	US+3	-			
3.3.022	OES2071	TEXAS WORKFORCE COMMISSION (TWC) REPORTS	FE+3	0	FE+3	-			
3.3.025	OES2072	JOB PROCEDURE RECORDS	US+3	0	US+3	-			
3.3.026	OES2073	AGENCY STAFFING REPORTS	US+3	0	US+3	-			
3.3.031	OES1497	EEO REPORTS AND SUPPORTING DOCUMENTATION	FE+3	0	FE+3	-	29 CFR 1602.32, 1602.39, 1602.41, 1602.48, and 1602.50.		
3.3.032	OES2074	EQUAL PAY RECORDS	FE+3	0	FE+3	-	29 CFR 1620.32		

Retention Codes (Field 7)				Archival Codes (Field 8)			
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			Agency	Storage	Total	9. Remarks									

4.2.002	OES2075	CASH RECEIPTS	FE+3	0	FE+3	-			
4.2.003	OES1791	DAILY CASH RECEIPTS LOGS	FE+3	0	FE+3	-			
1.1.067	FAC1723	REPORTS AND STUDIES (NON-FISCAL)	AC+6	0	AC+6	O	AC=Submission of report.		
5.2.019	FAC1721	SERVICE ORDERS	AC+5	0	AC+5	-	AC=Service request completed.		
5.4.012	FAC1722	SECURITY ACCESS RECORDS	AC+2	0	AC+2	-	AC=Key Returned		
4.7.000	OFPC1323	FISCAL RECORDS FOR CONSTRUCTION PROJECTS	AC+11	0	AC+11	-	AC=Close of project. The project close date is based on the fiscal year of the Final Payment to the contractor.		
5.2.002	OFPC1322	BUILDING CONSTRUCTION PROJECT FILES	AC+11	0	AC+11	O	AC=Completion of project.		
5.2.003	OFPC1325	BUILDING PLANS AND SPECIFICATIONS	LA	0	LA	O			
5.2.028	OFPC1948	BUILDING CONTRACTS	LA+10	0	LA+10	O	SEE ALSO item numbers 5.2.002 and 5.2.003		
1.1.000	OGC1473	PATENTS ISSUED/RELEASED	AC	0	AC	-	AC=Life of patent (17-20 years, depending on when patent is issued). 35 USC Sec. 154.		
1.1.000	OGC2141	PROFESSIONAL LIABILITY ENROLLMENT, CHANGES, AND RESIGNATION	AC+20	0	AC+20	-	AC=Date of enrollment.		
1.1.014	OGC1861	LEGAL OPINIONS AND ADVICE	AC+3	0	AC+3	O	AC=When closed by attorney.		

Retention Codes (Field 7)				Archival Codes (Field 8)			
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			Agency	Storage	Total	9. Remarks									

1.1.020	OGC2118	PUBLIC INFORMATION REQUESTS - NOT EXEMPTED	AC+2	0	AC+2	-	AC=After request has been satisfied.		
1.1.021	OGC2119	PUBLIC INFORMATION REQUESTS - EXEMPTED	AC+2	0	AC+2		AC=Date of notification that records are exempt.		
1.1.048	OGC1472	LITIGATION FILES - GENERAL LAW	AC+3	0	AC+3	O	AC=As applicable, decision of an agency not to file a lawsuit or decision that a lawsuit will not be filed against it on a matter; dismissal of a lawsuit for want of prosecution or on motion of the plaintiff; or final decision of a court (or of a court on appeal).		
1.1.048	OGC1862	LITIGATION FILES - HEALTH LAW	AC+20	0	AC+20	O	AC=As applicable, decision of an agency not to file a lawsuit or decision that a lawsuit will not be filed against it on a matter; dismissal of a lawsuit for want of prosecution or on motion of the plaintiff; or final decision of a court (or of a court on appeal).		

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	R – Review by State Archivist		
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			Agency	Storage	Total	9. Remarks	-	O							

1.1.048	OGC1863	LITIGATION FILES - CLAIMS AND BANKRUPTCY	AC+2	8	AC+10	O	AC=As applicable, decision of an agency not to file a lawsuit or decision that a lawsuit will not be filed against it on a matter; dismissal of a lawsuit for want of prosecution or on motion of the plaintiff; or final decision of a court (or of a court on appeal).		
3.4.004	OGC2036	OVERTIME AUTHORIZATIONS	FE+2	0	FE+2	-			
4.1.003	OGC2038	CANCELED CHECKS AND BANK STATEMENTS	FE+3	0	FE+3	-			
4.7.005	OGC2115	CLAIMS & BANKRUPTCY FILES (NON-LITIGATION)	AC+5	0	AC+5	-	AC=Resolution of claim.		
4.7.012	OGC2041	SIGNATURE AUTHORIZATIONS	AC+3	0	AC+3	-	AC=The end of the fiscal year in which the signature authorization is superseded.		
1.1.002	RTT1805	AUDITS	AC+7	0	AC+7	-	AC=Publication or release of final audit findings.		
1.1.067	RTT1996	REPORTS AND STUDIES (NON-FISCAL)	FE+3	0	FE+3	O			
5.2.014	RTT1997	INVENTORY - ANNUAL PHYSICAL	FE+3	0	FE+3	-			
5.2.015	RTT1998	INVENTORY, NOTICES OF EQUIPMENT REMOVED FROM	FE+3	0	FE+3	-			
5.2.021	RTT1999	SURPLUS PROPERTY SALE REPORTS	FE+3	0	FE+3	-			

Retention Codes (Field 7)				Archival Codes (Field 8)	
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		Agency	Storage	Total	9. Remarks				

5. Agency Item No.	6. Record Series Title	7. Retention Period	8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
5.2.023	RTT2000	YEAR-TO-DATE ACTIVITY (INVENTORY LISTING)	FE+3 0 FE+3	-		
5.2.026	RTT2001	FACILITIES RESERVATION LOGS	FE+2 0 FE+2	-		
1.1.067	SCM2048	REPORTS AND STUDIES (NON-FISCAL)	AC+3 0 AC+3	O	AC=Submission, completion of Report	
1.2.012	SCM2044	RECORDS INVENTORY WORKSHEETS	US 0 US	-		
3.4.004	SCM2045	OVERTIME AUTHORIZATIONS	FE+2 0 FE+2	-		
3.4.008	SCM2046	SICK LEAVE POOL DOCUMENTATION	FE+3 0 FE+3	-		
1.1.027	OGR1332	PROPOSED LEGISLATION	AC+1 0 AC+1	-	AC=After current legislative session ends (typically May 31)	
5.4.000	EHS1640	SYSTEM HAZARD REPORTS	AC+3 0 AC+3	-	AC=Release of report.	
5.4.002	EHS1641	EVACUATION PLANS	US 0 US	-		
5.4.003	EHS1639	INSPECTION RECORDS	AC+3 0 AC+3	-	AC=Date of the correction of the deficiency, if inspection reveals a deficiency.	
5.4.007	EHS1642	HAZARDOUS MATERIAL TRAINING RECORDS	5 0 5	-	Texas Health and Safety Code 502.009(g)	
4.7.005	RMI1699	SYSTEMWIDE INSURANCE CLAIM FILES	AC+4 0 AC+4	-	AC=Resolution of claim.	

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		Agency	Storage	Total	9. Remarks			

5.1.013	RMI1697	SYSTEMWIDE INSURANCE POLICIES	AC+20	0	AC+20	-	AC=Expiration or termination of the policy according to its terms. Needed to confirm past policies' coverage as insurance companies are not required to maintain this information.		
1.1.067	RRF1732	REPORTS AND STUDIES (NON-FISCAL)	FE+7	0	FE+7	O			
4.1.002	RRF1727	BILLING DETAIL	FE+3	0	FE+3	-	CAUTION: Does not include long distance telephone billing detail. SEE: item numbers 5.5.001, 5.5.006 and 5.5.007.		
4.2.000	RRF1709	WORKERS COMPENSATION - ACCOUNTING RECORDS	FE+3	0	FE+3	-			
4.2.000	RRF1726	VOUCHERS AND RELATED INFORMATION	FE+3	0	FE+3	-			
4.2.000	RRF1731	VOUCHERS - SETTLEMENTS	FE+3	0	FE+3	-			
4.5.002	RRF1728	INTERNAL FISCAL MANAGEMENT REPORTS	FE+30	0	FE+30	-	Annual statements must be kept to compile statistical information.		
4.7.007	RRF1725	DETAIL CHART OF ACCOUNTS	FE+3	0	FE+3	-			
5.4.000	RRF1710	MONTHLY PREMIUM TRANSFERS	FE+3	0	FE+3	-			

Retention Codes (Field 7)				Archival Codes (Field 8)			
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		Agency	Storage	Total	9. Remarks			

4.7.005	RWC1708	CLAIM FILES - WORKER'S COMPENSATION	AC+10	40	AC+50	-	AC=Resolution of claim. Claim files used to administer benefits over extended time. Microfilming discontinued in 1992. Master microfilm stored at State Records Center. Current record copies are maintained in paper form.	93-720-024 93-720-025	
5.4.001	RWC1707	ACCIDENT REPORTS AND ASSOCIATED DOCUMENTATION	CE+10	0	CE+10	-	29 CFR 1904.33. The Texas Department of Insurance retains copies for 50 years. Used in preparing analyses of program experience.		
1.1.000	OTIS1507	INFORMATION TECHNOLOGY PROJECT AND SYSTEMS DOCUMENTATION	AV	0	AV	-			
1.1.000	OTIS1519	VIDEOCONFERENCE SCHEDULING FORMS	FE+2	0	FE+2	-			
1.1.069	OTIS2122	REPORTS - ACTIVITY	1	0	1	-	CAUTION: See item number 1.1.064.		
1.2.001	OTIS2123	RECORDS MANAGEMENT PROGRAM COMPLIANCE RECORDS	FE+10	0	FE+10	-			
1.2.005	OTIS2121	RECORDS RETENTION SCHEDULE (SLR 105)	US	0	US	-	Original is retained by the State and Local Records Management Division, Texas State Library and Archives Commission.		

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

1.3.002	OTIS2140	PUBLICATION DEVELOPMENT FILES	AV	0	AV	O			
2.1.002	OTIS2127	MASTER FILES	AC	0	AC	-	AC=Completion of 3rd verification cycle, or audit completion confirming successful transaction updates, or required audit trail maintenance, or the ability to restore or migrate when errors are detected or when hardware or software changes occur.		
2.1.007	OTIS2128	SOFTWARE PROGRAM	AC	0	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.		

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	R – Review by State Archivist
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			Retention Period			Archival									
		Record Series Title	Agency	Storage	Total	9. Remarks			106 No.	TSLAC ONLY Amend. No.					

2.1.008	OTIS1518	HARDWARE DOCUMENTATION	AC	0	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 that requires hardware to be retrieved and read. 13 TAC 6.94. CAUTION: Software needed for access to electronic must be retained for the period of time required to access the records.		
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Retention Codes (Field 7)				Archival Codes (Field 8)			
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		Agency	Storage	Total	9. Remarks								

2.1.009	OTIS1508	TECHNICAL DOCUMENTATION	AC	0	AC	-	AC=Until electronic records are transferred to and made usable in a new hardware or software environment with new documentation or there are no electronic records being retained to meet an approved retention period that require the documentation to be retrieved and read. 13 TAC 6.94. CAUTION: Software needed for access to electronic must be retained for the period of time required to access the records.		
2.1.011	OTIS2129	FINDING AIDS, INDEXES, AND TRACKING SYSTEMS	AC	0	AC	-	AC=The related records have been destroyed. CAUTION: These records must carry the same retention period and archival code of the records they support.		
2.2.001	OTIS1526	SYSTEM MONITORING RECORDS	AV	0	AV	-			
2.2.001	OTIS2130	SYSTEM MONITORING RECORDS	AV	0	AV	-			
2.2.002	OTIS2131	CHARGEBACK RECORDS TO DATA PROCESSING SERVICES USERS	FE+3	0	FE+3	-			

Retention Codes (Field 7)

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Archival Codes (Field 8)

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2.2.004	OTIS2132	COMPUTER JOB SCHEDULES AND REPORTS	MO+3	0	MO+3	-		
2.2.010	OTIS2133	DATA PROCESSING POLICIES AND PROCEDURES	US+3	0	US+3	-	CAUTION: Does not include technical documentation of procedures necessary for reading or processing of electronic records. SEE item number 2.1.009.	
2.2.012	OTIS2134	OUTPUT RECORDS FOR COMPUTER PRODUCTION	AV	0	AV	-		
2.2.013	OTIS2135	QUALITY ASSURANCE RECORDS	AC	0	AC	-	AC=No longer needed as an audit trail for any records modified.	
2.2.016	OTIS2136	SOFTWARE REGISTRATIONS, WARRANTIES AND LICENSE AGREEMENT	LA+3	0	LA+3	-		
5.2.008	OTIS2141	EQUIPMENT HISTORY/SERVICE AGREEMENTS	LA+3	0	LA+3	-		
5.4.013	OTIS2142	DISASTER PREPARDNESS AND RECOVERY PLAN	US	0	US	-		
5.5.001	OTIS2143	TELECOMMUNICATIONS BILLING DETAIL	FE+3	0	FE+3	-		
5.4.012	OTIS1525	SECURITY ACCESS RECORDS	AC+2	0	AC+2	-	AC=Until superseded, date of expiration, or date of termination, whichever sooner.	

Retention Codes (Field 7)	Archival Codes (Field 8)
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5.5.003	OTIS1509	STATION ACTIVITY REPORTS	AV	0	AV	-		
5.5.007	OTIS2139	DISPUTED CALL DOCUMENTATION	FE+3	0	FE+3	-		
1.1.000	POL1542	POST ACADEMY TRAINING FILES	US+5	0	US+5	-	Texas Commission on Law Enforcement Standards and education require that ODOP maintain these records.	
1.1.000	POL1543	POLICE INVESTIGATIONS/REPORTS	AC	0	AC	-	AC=Statute of limitations. Maintained for legal reasons or until investigation matters are resolved.	
1.1.000	POL1765	USER IDENTIFICATION INFORMATION SHEETS	US	0	US	-		
1.1.000	POL1768	PARKING CITATIONS	FE+3	0	FE+3	-	Includes related correspondence.	
1.1.000	POL1949	TRAINING MATERIALS - ACADEMY TRAINING	AC+5	0	AC+5	-	AC=After graduation of cadet class. Texas Commission on Law Enforcement Officer Standards and Education recommends keeping indefinitely.	
1.1.000	POL1950	TRAINING MATERIALS - POLICE BASIC TRAINING	AC+50	0	AC+50	-	AC=End of training. Retained as a records of instructor and subject matter for each academy class.	
1.1.063	POL1951	MEETING NOTES - COMPONENT INSTITUTION POLICE CHIEFS	FE+10	0	FE+10	-		
1.1.067	POL1952	REPORTS AND STUDIES (NON-FISCAL)	PM	0	PM	O		

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1.1.067	POL2003	REPORTS - ANNUAL INSPECTIONS OF COMPONENT INSTITUTIONS	CE+10	0	CE+10	O		
3.1.000	POL1537	PERSONNEL FILES - COMMISSIONED OFFICERS	AC+5	0	AC+5	-	AC=Termination or resignation of officers.	
3.1.000	POL1771	PERSONNEL FILES - OFFICE OF DIRECTOR OF POLICE	AC+5	0	AC+5	-	AC=Termination of employment. Forward to Personnel Office for Officers, Admin, and Guards at termination.	
3.1.026	POL1766	CRIMINAL HISTORY CHECKS	AC	0	AC	-	AC=The criminal history record has served the immediate purpose for which it was obtained. See Texas Government Code Chapter 411, Subchapter F.	
3.3.027	POL1761	APTITUDE AND SKILLS TESTS	US+3	0	US+3	-	29 CFR 1602.49.	
3.3.028	POL1528	APTITUDE AND SKILLS TESTS (TEST PAPERS)	CE+3	0	CE+3	-	29 CFR 1602.49.	
5.2.000	POL1770	PROPERTY LOGS AND CARDS FOR LOST AND FOUND PROPERTY	FE+3	0	FE+3	-		
5.4.011	POL1531	VISITOR CONTROL REGISTERS	FE+3	0	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			
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist			



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2. Agency Code 720		3. Agency Name UNIVERSITY OF TEXAS SYSTEM ADMINISTRATION							
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				

5. Agency Item No.	6. Record Series Title	7. Retention Period	8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
5.4.012	POL1538	SECURITY ACCESS RECORDS	AC+2 0 AC+2	-	AC=Until superseded, date of expiration, or date of termination, whichever sooner. Electronic records are the official copy. Paper records provide vital records protection.	
5.6.005	POL1529	VEHICLE USE REPORTS	FE+3 0 FE+3	-		
1.1.000	REA1212	REAL ESTATE CLOSING PAPERS	PM 0 PM	-		
1.1.000	REA2113	COMPONENT PROPERTIES AND TRUST FUND PROPERTIES - WORKING PAPERS	AC+3 0 AC+3	-	AC=After closed.	
2.1.011	REA2110	REAL ESTATE FILING SYSTEMS	AC 0 AC	-	AC=Until superseded or the related records have been destroyed. CAUTION: These records must carry the same retention period and archival code of the records they support.	
1.1.000	SIS2146	TECHNOLOGY ADVISORY GROUPS MEETING MINUTES, AGENDAS, AND SUPPORTING DOCUMENTATION	AC+3 0 AC+3	-	AC=After minutes are transcribed.	
1.1.062	SIS1907	MEETINGS - SUPPORTING DOCUMENTATION	FE+2 0 FE+2	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					

5.1.001	SIS1900	CONTRACTS AND LEASES	AC+20	0	AC+20	-	AC=From the date contract signed, but not less than 4 years after the expiration or termination of the instrument according to its terms. SEE item number 5.1.017 for contract logs.		
1.1.000	STM1912	COMPACTS	FE+20	0	FE+20	O			
1.1.000	STM1913	ACCOUNTABILITY REPORTS	AC	0	AC	O	AC=Statute of limitations.		
1.1.000	STM1914	PROJECTS/EVENTS/INITIATIVES	AC+5	0	AC+5	-	AC=Conclusion or termination of projects, event, or initiative.		
1.1.000	STM1915	EXTERNAL COMMITTEE MEMBERSHIP, ADVISORY BOARDS AND ASSOCIATIONS	AV	0	AV	-			
1.1.055	STM1918	STRATEGIC PLANS	AC+6	0	AC+6	I	AC=September 1 of odd-numbered calendar years. Archives Note: The archival requirement is met by sending the required copies of the plans to the Texas State Publications Depository Program, Texas State Library and Archives Commission.		
1.1.068	STM1926	REPORTS ON PERFORMANCE MEASURES	AC+6	0	AC+6	-	AC=September 1 of odd-numbered calendar years		

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



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2. Agency Code	720	3. Agency Name					UNIVERSITY OF TEXAS SYSTEM ADMINISTRATION				
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		Agency	Storage	Total	9. Remarks						

1.3.001	STM1927	STATE PUBLICATIONS	AC+2	0	AC+2	-	AC=Until superseded or obsolete. CAUTION: Many state publications must be submitted to the Texas State Publications Depository Program, Texas State Library and Archives Commission, by law (Government Code 441.101-441.106). The Texas State Library and Archives Commission will retain a copy of all state publications submitted to it on a continuing basis, subject to periodic evaluation to determine if the publication merits further retention.		
1.3.002	STM1928	PUBLICATION DEVELOPMENT FILES	AV	0	AV	O			
3.1.000	STM1920	PERSONNEL RECORDS	AC+5	0	AC+5	-	AC=Termination of employment.		
4.2.000	STM1921	TRAVEL RECORDS	FE+3	0	FE+3	-			
1.1.000	ACC1353	UNIT FILES	AC+3	0	AC+3	-	AC=After Closed.		
1.1.000	ACC1364	DOCUMENT CONTROL	US	0	US	-			
1.1.000	ACC1368	UNIVERSITY LANDS ACCOUNTING OFFICE REPORTING MANUAL	US	0	US	-			
1.1.000	ACC1369	GAS AND OIL CONTRACTS	PM	0	PM	-	Texas Education Code Chapter 55, Subchapter D		
1.1.000	ACC1370	WELL RECORDS (BIN CARDS)	PM	0	PM	-			

Retention Codes (Field 7)

AC – After Closed, Terminated, Completed, Expired, Settled
AV – Administrative Value

CE – Calendar Year End
FE – Fiscal Year End

LA – Life of Asset
MO – Months

PM – Permanent
US – Until Superseded

Archival Codes (Field 8)

A – Transfer to State Archives
R – Review by State Archivist



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		Agency	Storage	Total	9. Remarks				

1.1.000	ACC1371	TAKE IN KIND (TIK) OIL AND GAS CONTRACTS	FE+3	0	FE+3	-		
1.1.000	ACC1386	WELL RECORDS (PLAT BOOKS)	PM	0	PM	-		95-720-060
2.1.007	ACC1359	SOFTWARE PROGRAMS	AC	0	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.	
4.1.000	ACC1363	UNIVERSITY LANDS ACCOUNTING OFFICE INVENTORY	FE+3	0	FE+3	-		
4.1.003	ACC1374	CANCELLED CHECKS/STUBS/WARRANTS/DRAFTS	FE+3	7	FE+10	-		
4.2.000	ACC1355	GAS PURCHASE STATEMENTS	FE+3	0	FE+3	-		
4.2.000	ACC1358	OIL ROYALTY LEDGERS AND OIL PENALTY LEDGERS	FE+3	7	FE+10	-		94-720-049

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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2. Agency Code		720		3. Agency Name						UNIVERSITY OF TEXAS SYSTEM ADMINISTRATION	
	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					

4.2.000	ACC1360	OIL CHARGE AND OIL PENALTY CHARGE VOUCHERS	FE+3	7	FE+10	-		94-720-050	
4.2.000	ACC1373	CASH CONTROL	FE+3	7	FE+10	-		94-720-043	
4.2.000	ACC1379	REFUND VOUCHERS - ULAO COPY	FE+3	7	FE+10	-			
4.2.000	ACC1385	SURFACE LEDGERS	FE+3	7	FE+10	-		94-720-052	
4.2.000	ACC1387	SURFACE VOUCHERS (BRINE, SALT WATER, DISPOSAL, GRAZING, SURFACE AND WATER)	FE+3	7	FE+10	-		94-720-053	
4.2.000	ACC5	OIL CHARGE AND PENALTY CHARGE VOUCHERS	FE+3	7	FE+10	-			
4.2.000	ACC6	GAS CHARGE AND PENALTY CHARGE VOUCHERS	FE+3	7	FE+10	-			
4.2.000	ACC7	OIL ROYALTY LEDGERS & OIL PENALTY LEDGERS	FE+3	7	FE+10	-			
4.2.000	ACC8	INCOME AND INCOME PENALTY VOUCHERS	FE+3	7	FE+10	-			
4.2.000	ACC9	GAS ROYALTY LEDGERS AND PENALTY LEDGERS	FE+3	7	FE+10	-			
4.2.001	ACC1378	CASH DEPOSIT VOUCHERS	FE+3	7	FE+10	-			
4.2.001	ACC4	DEPOSIT VOUCHERS	FE+3	7	FE+10	-			
4.2.006	ACC1375	JOURNAL VOUCHERS	FE+3	7	FE+10	-		94-720-044	
4.3.002	ACC1376	CASH DEPOSIT REGISTERS	FE+3	7	FE+10	-			

Retention Codes (Field 7)	Archival Codes (Field 8)
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CE – Calendar Year End FE – Fiscal Year End	PM – Permanent US – Until Superseded
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		Agency	Storage	Total	9. Remarks			

4.3.003	ACC1380	EXPENDITURES JOURNALS OR REGISTERS	FE+3	7	FE+10	-	See Note 5. Previous Formerly Remittance by Payor AIN=ULA31	92-720-018	
4.4.000	ACC1356	GAS CHARGE AND GAS PENALTY CHARGE VOUCHERS (WORKING PAPERS)	FE+3	7	FE+10	-			
4.4.000	ACC1372	STATEMENT OF ACCOUNT	FE+3	7	FE+10	-			
4.4.000	ACC1384	INCOME AND INCOME PENALTY VOUCHERS (WORKING PAPERS)	FE+3	7	FE+10	-		94-720-051	
4.4.002	ACC1377	ACCOUNTS RECEIVABLE LEDGERS	FE+3	7	FE+10	-		92-720-011	
4.5.000	ACC1	TEXAS RAILROAD COMMISSION PRODUCTION REPORTS	FE+3	7	FE+10	-		92-720-015	
4.5.000	ACC1383	SUMMARIES-PENALTY AND INTEREST ON LATE PAYMENTS	FE+3	12	FE+15	-		92-720-012	
4.5.000	ACC2	PRICE BULLETINS	FE+3	12	FE+15	-		92-720-016	
4.5.001	ACC1357	WORKSHEETS FOR PREPARING FISCAL REPORTS FORMERLY TRIAL BALANCES	FE+3	7	FE+10	-	See Note 5. Previous AIN=ULA46		
4.5.002	ACC1351	INTERNAL FISCAL MANAGEMENT REPORTS	FE+3	7	FE+10	-	See Note 5. Previous AIN=ULA19		
4.5.002	ACC3	INTERNAL FISCAL MANAGEMENT REPORTS	FE+3	7	FE+10	-			
4.7.002	ACC1382	BANK STATEMENTS	FE+3	0	FE+3	-	See Note 5. Previous AIN=ULA33		
4.7.007	ACC1381	DETAIL CHART OF ACCOUNTS	FE+3	7	FE+10	-	See Note 5. Previous AIN=ULA32	94-720-047	

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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2. Agency Code	720	3. Agency Name	UNIVERSITY OF TEXAS SYSTEM ADMINISTRATION							
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			Agency	Storage	Total	9. Remarks				

5.1.001	ACC1350	CONTRACTS AND LEASES	AC+24	26	AC+50	I	AC=Expiration or termination of the instrument according to its terms. SEE item number 5.2.028 for building construction contracts and item number 5.1.017 for contract logs.	95-720-059	
4.2.000	LAC421	REMITTANCE BY DOCUMENT (UT-3)	FE+3	7	FE+10	-		92-720-010	
1.1.000	LLM1600	WATER AND HARD MINERALS PROSPECT PERMITS AND SUPPORTING DATA	PM	0	PM	-			
1.1.000	LLM1601	PUGH CLAUSE DATA - DEVELOPMENT COMPLIANCE	AV	0	AV	-	Information used for exploration and development of oil and gas resources. Previous AIN=LLM23.		
1.1.000	LLM1604	TECHNICAL WELL FILES	PM	0	PM	-			
1.1.000	LLM1607	UNPLUGGED WELL REPORT	US	0	US	-	Previous AIN=LLM31.		
1.1.000	LLM1609	WELL TICKETS	AV	0	AV	-	Historical information used for exploration and development of oil and gas resources. Previous AIN=LLM36.		
1.1.000	LLM1612	DEVELOPMENT REPORT	US	0	US	-	Previous AIN=LLM03.		
1.1.000	LLM1613	GEOPHYSICAL CONTOUR MAPS	AV	0	AV	-	Source for evaluating acreage for oil and gas leases. Previous AIN=LLM05.		

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



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2. Agency Code	720	3. Agency Name	UNIVERSITY OF TEXAS SYSTEM ADMINISTRATION						
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			Agency	Storage	Total	9. Remarks			

1.1.000	LLM1614	GEOPHYSICAL SURVEY PERMITS AND SUPPORTING DOCUMENTS	AV	0	AV	-	Information used for exploration and development of oil and gas leases. Previous AIN=LLM06.		
1.1.000	LLM1621	ELECTRIC LOGS	PM	0	PM	-			
1.1.000	LLM1623	REDUCED ROYALTY LEASE DATA	AV	0	AV	-	Previous AIN=LLM24.		
4.5.005	LLM1605	EXTERNAL FISCAL REPORTS	PM	0	PM	-	Information used for exploration and development of oil and gas resources. Previous AIN=LLM28		
5.1.000	LLM1599	PRODUCER AUTHORITY AND CERTIFICATION OF COMPLIANCE FORM	5	0	5	-	Data used in compiling weekly activity report and to show oil and gas gatherers. Previous AIN=LLM18.		
5.1.000	LLM1603	SALT WATER DISPOSAL CONTRACTS	AC+4	0	AC+4	-	AC=Expiration or termination of the instrument according to its terms. Previous AIN=LLM26.		
5.1.000	LLM1608	WEEKLY LETTER	PM	0	PM	-	Report provided to University Departments detailing oil and gas resources and compliance. Previous AIN=LLM3.		
5.1.000	LLM1611	COMMINGLING PERMITS	AC+4	0	AC+4	-	AC=Expiration or Termination of the instrument according to its terms. Previous AIN=LLM02.		
5.1.000	LLM1615	LACT UNIT INSTALLATION PERMITS	AC+1	0	AC+1	-	AC=When Terminated. Previous AIN=LLM09.		

Retention Codes (Field 7)	Archival Codes (Field 8)
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			Agency	Storage	Total	9. Remarks									

5.1.000	LLM1616	LEASE MAPS	US	0	US	-	Maps are paper and Mylar film. Used for exploration and compliance. Texas Education Code 66.77. Previous AIN=LLM11.		
5.1.000	LLM1617	LEASE SALE INFORMATION	AV	0	AV	-	Previous AIN=LLM12.		
5.1.000	LLM1618	LEASE SALE NOMINATIONS INFORMATION	5	0	5	-	Confidential information used to compile listing of tracts to be offered to be offered for oil and gas leasing. Previous AIN=LLM13.		
5.1.000	LLM1619	OIL AND GAS TABULATIONS	75	0	75	-	Historical data used for monitoring field production trends. Previous AIN=LLM17.		
5.1.000	LLM1620	LEASE SALE RESULTS	PM	0	PM	-	Historical reference data of oil and gas leasing. Previous AIN=LLM14.		
5.1.000	LLM1624	WATER LEASE TECHNICAL DATA	PM	0	PM	-	Previous AIN=LLM33.		
5.1.000	LLM1625	UNDERGROUND STORAGE LEASE TECHNICAL DATA	AC+50	0	AC+50	-	AC = After Closed. Historical reference, environmental compliance and exploration and development for facilities. Previous AIN=LLM29.		
5.1.000	LLM1626	LEASE CARDS-HISTORICAL	AC+5	0	AC+5	-	AC = When Terminated. Reference data for oil and gas lease ownership. Previous AIN=LLM10.		

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



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		Agency	Storage	Total					

5.1.000	LLM1627	LEASE ASSIGNMENT BRIEFS	AC+5	0	AC+5	-	AC=Termination of lease. Previous AIN=LLM16.		
5.1.001	LLM1610	BRINE LEASE DATA	PM	0	PM	-			
5.1.010	LLM1622	LICENSES AND PERMITS FOR NON-VEHICLES	AC+2	0	AC+2	-	AC=Expiration date of license or permit. Previous AIN=LLM15		
1.1.000	LMA1410	WEEKLY EMPLOYEE REPORTS	AV	0	AV	-	Previous AIN=LMA35.		
1.1.040	LMA1405	SPEECHES, PAPERS AND PRESENTATIONS	AC+2	0	AC+2	O	AC=End of term or service in agency		
1.1.062	LMA1402	MEETINGS - SUPPORTING DOCUMENTATION	FE+3	0	FE+3	I			
2.1.007	LMA1396	SOFTWARE PROGRAMS	AC	0	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. Previous AIN=LMA08		

Retention Codes (Field 7)				Archival Codes (Field 8)	
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3.1.023	LMA1413	POSITION/JOB DESCRIPTIONS	AC+4	0	AC+4	-	AC=Until superseded or job eliminated. Previous AIN=LMA26 40 TAC 815.106(i)		
3.3.000	LMA1418	PERSONNEL RECORDS	AC+3	0	AC+3	-	AC=Life of retiree. Previous AIN=LMA21.		
3.4.002	LMA1408	LEAVE STATUS REPORTS	FE+4	0	FE+4	-	Previous AIN=LMA32		
4.1.003	LMA1417	CANCELLED CHECKS/STUBS/WARRANTS/DRAFTS	FE+3	0	FE+3	-	Previous AIN=LMA03		
4.2.001	LMA1414	CASH DEPOSIT VOUCHERS	FE+3	0	FE+3	-	Previous AIN=LMA12		
4.2.003	LMA1389	DAILY CASH RECEIPTS LOGS	FE+3	0	FE+3	-			
4.3.003	LMA1394	EXPENDITURES JOURNALS OR REGISTERS	FE+3	0	FE+3	-	Previous AIN=LMA06		
4.5.000	LMA1400	EXPENDITURE AND OBJECT CODE SUMMARIES	FE+5	0	FE+5	-	Previous AIN=LMA15.		
5.1.004	LMA1416	MAIL AND TELECOMMUNICATIONS LISTINGS	US	0	US	-	Previous AIN=LMA18		
5.1.010	LMA1397	LICENSES AND PERMITS FOR NON-VEHICLES	AC+2	0	AC+2	-	AC=Expiration date of license or permit. Previous AIN=LMA09		
5.2.014	LMA1401	INVENTORY-ANNUAL PHYSICAL	FE+3	0	FE+3	-	Previous AIN=LMA17		
5.4.001	LMA1411	ACCIDENT REPORTS AND ASSOCIATED DOCUMENTATION	CE+6	0	CE+6	-	29 CFR 1904.33. The Texas Department of Insurance retains copies of the reports submitted to it for 50 years.		

Retention Codes (Field 7)				Archival Codes (Field 8)	
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		Agency	Storage	Total	9. Remarks				

5.6.005	LMA1409	VEHICLE USE REPORTS	FE+3	0	FE+3	-			
1.1.000	LMC1591	CHEMICAL INVENTORY	1	0	1	-			
5.4.000	LMC1593	PESTICIDE DAILY CHEMICAL USE LOG	2	0	2	-	Required by the Texas Department of Agriculture. Previous AIN=LMC03.		
5.4.000	LMC1594	PESTICIDE SPECIMEN LABEL	AV	0	AV	-	Required by Environmental Protection Agency's Worker Protection Standards and the Texas Department of Agriculture. Previous AIN=LMC04.		
5.4.000	LMC1595	PESTICIDE AND LICENSE RECORDS - PERMANENT EMPLOYEES	30	0	30	-	Texas Department of Agriculture requires 30-year retention. Previous AIN=LMC05		
5.4.009	LMC1596	WORKPLACE CHEMICAL LISTS	30	0	30	-	Texas Health and Safety Code, 502.005(d)		
5.4.010	LMC1592	MATERIAL SAFETY DATA SHEETS	AC	0	AC	-	AC=After sheets are updated or hazardous chemical no longer stored.		
1.1.000	LMI1424	DOSIMETRY REPORTS	AC+30	0	AC+30	-	AC=After termination of employee. In accordance with Texas regulations for control of radiation. Previous AIN=LMI01.		
1.1.000	LMI1426	LICENSE AND HISTORICAL INFORMATION	AC+5	0	AC+5	-	AC=Termination of project. Previous AIN=LMI03.		

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STATE OF TEXAS Records Retention Schedule

2. Agency Code 720		3. Agency Name UNIVERSITY OF TEXAS SYSTEM ADMINISTRATION							
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				

1.1.000	LMI1428	SITE SURVEYS	5	0	5	-	In Accordance with Texas Regulations for Control of Radiation. Previous AIN=LMI05.		
4.1.000	LMI1425	FINANCIAL RECORDS	AC+5	0	AC+5	-	AC=Termination of project. Previous AIN=LMI02.		
5.2.000	LMI1427	SHIPPING AND RECEIVING RECORDS	AC+5	0	AC+5	-	AC=Termination of project. Previous AIN=LMI04.		
5.4.000	LMI1429	WASTE DOCUMENTATION	AC	0	AC	-	AC=End of License. Documents transferred to new waste site. In accordance with Texas regulations for control of radiation. Previous AIN=LMI06.		
1.1.000	LMS1439	WILDLIFE HARVEST RECOMMENDATIONS	30	0	30	-	Midland record is sole record. Used for yearly trend analysis. Previous AIN=LMS06.		
1.1.038	LMS1449	CUSTOMER SURVEYS	AC+30	0	AC+30	-	AC=Final disposition of summary report. Used for historical reference. Previous AIN=LMS17. SEE item number 1.1.067 for summary reports compiled from customer surveys.		
4.1.000	LMS1435	GRAZING LESSEES' PAYMENT CALCULATIONS	10	0	10	-			

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			



SLR 105

Form SLR 105C must accompany this form.

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STATE OF TEXAS Records Retention Schedule

2. Agency Code		720		3. Agency Name						UNIVERSITY OF TEXAS SYSTEM ADMINISTRATION		
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4.1.000	LMS1442	GRAZING LESSEES' LIVESTOCK CHANGE FORMS	CE+3	0	CE+3	-	Previous AIN=LMS09.		
4.1.000	LMS1443	LIVESTOCK MARKET PRICES	10	0	10	-	Previous AIN=LMS11.		
4.2.000	LMS1437	DAMAGE ACCOUNT DETAIL BY LEASE	10	0	10	-	Previous AIN=LMS04.		
4.5.000	LMS1432	FAWP (FUNDS FOR AGRICULTURE AND WILDLIFE PROJECTS) APPLICATIONS	FE+3	0	FE+3	-			
4.5.000	LMS1433	SUMMARY OF FAWP (FUNDS FOR AGRICULTURE AND WILDLIFE PROJECTS) APPLICATIONS	20	0	20	-			
4.5.000	LMS1434	GRAZING LEASE - ANIMAL UNIT REPORTS	30	0	30	-			
4.6.002	LMS1438	DAMAGE ACCOUNT RECONCILIATIONS	FE+3	0	FE+3	-	Previous AIN=LMS05		
4.7.000	LMS1440	EASEMENTS ON U. T. LANDS	PM	0	PM	-	Previous AIN=LMS07.		
5.1.000	LMS1436	ABANDONED LINE RECORDS	AV	0	AV	-	Record is maintained until line has been removed. Environmental Compliance. Previous AIN=LMS01.		
5.1.000	LMS1441	GRAZING EASEMENTS ON U. T. LANDS	PM	0	PM	-	Maintained for historical purposes. Previous AIN=LMS08.		
5.1.000	LMS1444	MAPS OF UNIVERSITY LANDS	LA	0	LA	-	Necessary for historical value. Education Code 66.77. Previous AIN=LMS12.		

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STATE OF TEXAS

Records Retention Schedule

SLR 105

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2. Agency Code 720		3. Agency Name UNIVERSITY OF TEXAS SYSTEM ADMINISTRATION								
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5.1.000	LMS1445	MATERIAL SOURCE PERMITS	1	0	1	-	Issued to companies that purchase caliche on U. T. Lands. Previous AIN=LMS13.		
5.1.001	LMS1447	SURFACE LEASES	PM	0	PM	-			
5.2.000	LMS1446	RATE AND DATE SCHEDULES	50	0	50	-	Used to help determine new fee structures on U.T. Lands. Based on information in expired leases. Previous AIN=LMS14.		
5.2.000	LMS1448	WATER BOOKS/MANAGEMENT RECORDS	PM	0	PM	-	Maintained permanently for environmental and historical purposes. Previous AIN=LMS16.		
1.1.019	LMV1455	PUBLIC RELATIONS RECORDS	PM	0	PM	O	Previous AIN=LMV04.		
1.1.000	LMV1456	RESEARCH RECORDS OF EXPERIMENTAL VINEYARD AND WINERY	AC+10	0	AC+10	-	AC=After research is completed. Previous AIN=LMV05.		
1.1.000	LMV1457	WINERY RECORDS - EXPERIMENTAL WINERY	US	0	US	-	Maintained in accordance with the Bureau of Alcohol, Tobacco and Firearms. Previous AIN=LMV06.		
1.1.068	LMV1452	REPORTS ON PERFORMANCE MEASURES	AC+10	0	AC+10	-	AC=September 1 of odd-numbered calendar years		
4.3.002	LMV1454	RECEIPTS JOURNALS OR REGISTERS	FE+3	0	FE+3	-	Previous AIN=LMV03		
1.1.000	LTM1670	GEOPHYSICAL SURVEY PERMITS/CONTRACTS	LA+3	0	LA+3	-			

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STATE OF TEXAS

Records Retention Schedule

SLR 105

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4.1.003	LTM1668	CANCELLED CHECKS/STUBS/WARRANTS/DRAFTS	CE+4	0	CE+4	-		
4.1.007	LTM1674	TRANSFERS OR BUDGET REVISIONS	FE+4	0	FE+4	-		
4.7.004	LTM1667	CAPITAL ASSET RECORDS	LA+3	0	LA+3	-		
5.1.001	LTM1669	LEASES	AC+4	0	AC+4	-	AC=After Termination Previous AIN=LTM11.	
5.1.000	LTM1672	TECHNICAL WELL FILES	LA+3	0	LA+3	-		
5.1.000	LTM1673	UNIT/OPERATING AGREEMENTS	LA+3	0	LA+3	-	Previous AIN=LTM30.	

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