

March 5, 2020



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

Dear Mr. Gary,

Amendment 1 to your agency's 7th recertification of the records retention schedule is approved for use as of 2/27/2020, and may be accessed on our website at <https://www.tsl.texas.gov/slrms/state/schedules>. Please maintain this amendment with your currently approved schedule so that it can be easily referenced.

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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Darryl Tocker

Director and Librarian
Mark Smith

Assistant State Librarian
Gloria Meraz

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 rules (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:

Andrew Glass
512-463-2631
aglass@tsl.texas.gov

Sincerely,

A handwritten signature in black ink, appearing to read "CK", written over a light blue horizontal line.

Craig Kelso
Director and State Records Administrator

cc: Agency head

TSLAC

*Preserving yesterday
Informing today
Inspiring tomorrow*



STATE OF TEXAS

Records Retention Schedule Certification

SLR 105C

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

Section 1. Agency Information

(Submitting agencies complete this section only)

Agency Code 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 Jim Gary
Name (Print or type) Jim Gary
Date 7 February 2020

Section 2. Approvals

(Submitting agencies do not write in this section)

State Auditor's Office
Signature
Name (Print or type)
Date

Not Required at This Time

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

Signature Gloria Meraz
Name (Print or type) Gloria Meraz
Date 2/27/2020

Cert/Recert No. 7 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:720		2. Agency Name: University of Texas System Administration											
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						
GPS1777	1.1.000	Namings	Categorize items related to philanthropic namings, not just our building naming inventory. Items included in the record series may range from gift agreements, to confidential donor correspondence, UT System approval letters and the like.	FE	10				O	Amended Record Series Title from "Building Naming Inventory" to "Namings" per OER request Jan 2019		C	GPS1777



October 5, 2018

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

Re: Agency records retention schedule approved for use.

Dear Mr. Gary,

Your agency's records retention schedule is approved for use as of October 2, 2018. Your currently approved records retention schedule is available on our website at <https://www.tsl.texas.gov/slrn/state/schedules.html>. Please ensure that all old copies of the schedule are superseded with this recertified copy.

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

Each agency schedule must be reviewed, updated and submitted for recertification annually for the first two years after the initial approval of the schedule and every five years thereafter. The deadline for submission of your schedule for its next recertification is the last working day of October, 2023.

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, Gina Cervantes at 512-463-6623 or gcervantes@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,

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

Craig Kelso
Director and State Records Administrator

cc: Agency head

Lorenzo de Zavala
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SLR 105C

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(Submitting agencies complete this section only)

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Agency Name University of Texas System Admin

(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 [Signature]
Name (Print or type) Jim Gray
Date 12/18/2017

Section 2. Approvals

(Submitting agencies do not write in this section)

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

Signature
Name (Print or type) Not Required at This Time
Date

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

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

Cert/Recert No. 7 Amendment No. --

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STATE OF TEXAS
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SLR 105
 Rev. 2017-07

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Archival Codes (Field 10)

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

1. Agency Code: 720		2. Agency Name: University of Texas System									
3. Agency Item No.	4. Record Series Item No.	5. Record Series Title	6. Description	7. Ret. Code	8. Retention Period			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
ALL2142	1.1.007	CORRESPONDENCE - EXECUTIVE		AC	4			AC=End of term or service in agency.	O		
ALL1798	1.1.008	CORRESPONDENCE - NON-EXECUTIVE		AC	2			AC=Send or receipt date.			
ALL1800	1.1.010	OFFICE PROCEDURES AND DIRECTIVES - INTERNAL		US	1						
ALL1801	1.1.013	CALENDARS, APPOINTMENTS, ITINERARIES - NON-EXECUTIVE		CE	1						
ALL2143	1.1.013	CALENDARS, APPOINTMENTS, ITINERARIES - EXECUTIVE		AC	1			AC=End of term or service in agency.	O	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.	
ALL1827	1.1.023	ORGANIZATION CHARTS		US					I		



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ALL1828	1.1.024	PLANS AND PLANNING RECORDS		AC	3			AC=Decision made to implement or not to implement result of planning process. Some of these records may be confidential.	0		
ALL1831	1.1.040	SPEECHES, PAPERS, AND PRESENTATIONS		AC				AC=End of term or service in agency.	0		
ALL1835	1.1.057	TRANSITORY INFORMATION		AC				AC=Purpose of record has been fulfilled			
ALL1837	1.1.063	STAFF MEETING MINUTES AND NOTES		FE	1						
ALL1838	1.1.064	AGENCY PERFORMANCE MEASURES DOCUMENTATION		FE	3					This series trumps any series with a shorter retention that is used for performance measure of an agency.	
ALL1840	1.1.067	REPORTS AND STUDIES (NON-FISCAL)		FE	3				0		
ALL1943	1.1.069	REPORTS - ACTIVITY		FE	1						
ALL1829	1.1.070	RULES, POLICIES, PROCEDURES - SYSTEM PROGRAMS AND SERVICES		AC	3			AC=End of need for rule, policy, or procedure.	0		



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					Years	Months	Days				
ALL1940	1.2.014	RECORDS MANAGEMENT PLANS AND GUIDES		US	1					Disaster Recovery Plans are vital records.	
ALL1941	2.2.016	SOFTWARE REGISTRATIONS, WARRANTIES AND LICENSE AGREEMENT		LA	3						
ALL1942	5.2.010	EQUIPMENT MANUALS		LA							
ALL1843	3.3.030	TRAINING - MATERIALS AND ADMINISTRATIVE RECORDS		US	2					Caution: Does not include hazardous materials training records which must be kept 5 years - Texas Health and Safety Code, 502.009(g).	
ALL1844	3.4.006	TIME AND LEAVE RECORDS		FE	4						40 TAC 815.106(i)
ALL2144	4.1.005	INVENTORY & OTHER COST FILES	PRODUCTION, JOB, LABOR, QUOTES, PRICING, SPECIFICATIONS, ETC.	FE	3						
ALL2160	4.1.006	INVESTMENT RECORDS		AC	20			AC=After reconciliation of transaction.			



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					Years	Months	Days				
ALL1848	4.2.005	PURCHASES AND EXPENDITURE RECORDS		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.	
ALL1849	4.5.002	INTERNAL FISCAL MANAGEMENT REPORTS		FE	3						
ALL1851	4.6.002	ACCOUNT RECONCILIATIONS		FE	3						
ALL1944	1.2.010	RECORDS DISPOSITION LOGS			10						
ALL1953	5.1.001	CONTRACTS AND LEASES		AC	7			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.	Government Code, 441.1855
ALL1933	5.1.017	LOGS AND TRACKING RECORDS	CONTRACTS, CORRESPONDENCE, ETC.	FE	3						
ACA1178	1.1.000	DEGREE PROGRAMS		AC	1			AC=After approval by department head			



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					Years	Months	Days				
ACA12	1.1.000	CHRONOLOGICAL ADMINISTRATIVE RECORDS		AC	20			AC=End of term			
ACA1756	1.1.000	APPOINTMENTS BY GOVERNOR		FE	1				O		
ACA1954	1.1.063	MEETING NOTES - ADVISORY COUNCILS		FE	2						
ACA1955	1.1.063	MEETING NOTES - COUNCIL OF ACADEMIC INSTITUTIONS		FE	2						
ACA2005	1.2.012	RECORDS INVENTORY WORKSHEETS		US							
ACA1179	2.1.011	FINDING AIDS, INDEXES, AND TRACKING SYSTEMS		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.	
ACA1956	3.1.014	PRESIDENTIAL SEARCH COMMITTEE RECORDS		AC	2			AC=When applicant accepts or declines the position		CAUTION: Does not include criminal history checks. SEE item number 3.1.026.	29 CFR 1602.49(a).
ACA2006	3.3.020	WORK SCHEDULES/ASSIGNMENTS		FE	1						



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					Years	Months	Days				
ACA2007	3.3.023	REIMBURSABLE ACTIVITIES, REQUESTS AND AUTHORIZATIONS TO ENGAGE IN		FE	3						
ACA2008	3.4.004	OVERTIME AUTHORIZATIONS		FE	2						
ACA2009	4.7.012	SIGNATURE AUTHORIZATIONS		AC	3			AC=The end of the fiscal year in which the signature authorization is superseded.			
ACA1759	5.6.002	AIRPLANE PASSENGER LISTS		FE	3						
AUD1960	1.1.002	AUDITS		AC	7			AC=Publication or release of final audit findings.			
AUD1961	1.1.002	AUDITS - INTERNAL AUDIT COMMITTEE PACKETS		AC	25			AC=Publication or release of final audit findings.			
AUD1962	1.1.002	AUDITS - PEER REVIEWS		AC	10			AC=Publication or release of final audit findings.			
AUD1958	3.1.019	PERFORMANCE APPRAISALS		FE	2						29 CFR 1620.32(c)



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					Years	Months	Days				
AUD1959	5.1.004	MAIL AND TELECOMMUNICATIONS LISTINGS		US							
BOR1976	1.1.059	MEETINGS, CERTIFIED AGENDAS, OR TAPE RECORDINGS OF CLOSED		AC	2			AC=The date of the meeting or completion of pending action involving the meeting, whichever is later.		SEE caution comment under 1.1.058.	Government Code, 551.104(a).
BOR1977	1.1.007	CORRESPONDENCE - ADMINISTRATIVE		AC	1			AC=Term of office, but not less than 4 years.	I		
BOR1978	1.1.007	CORRESPONDENCE - ADMINISTRATIVE REGENTAL		PM					I		
BOR1979	1.1.060	MEETINGS, AUDIO OR VIDEOTAPES OF OPEN		AC			90	AC = Official Approval of written minutes of the meeting by the governing body of an agency.			
BOR2049	1.1.024	EVENT PLANNING RECORDS		AC	3			AC=Event date.	O		



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BOR2117	1.1.058	MEETING AGENDA AND MINUTES		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.	
BOR1247	1.1.062	MEETINGS - SUPPORTING DOCUMENTATION		PM					I		
BOR1963	1.1.066	REPORTS - BIENNIAL OR ANNUAL AGENCY (NARRATIVE)		AC	6			AC=September 1 of odd-numbered calendar years.	I	Sending a copy to the Texas State Publications Depository satisfies the archival requirement.	
BOR1964	1.1.068	REPORTS ON PERFORMANCE MEASURES		AC	6			AC=September 1 of odd-numbered calendar years			
BOR1866	1.1.070	RULES, POLICIES, AND PROCEDURES - FINAL		PM					I		
BOR2080	1.2.013	RECORDS CONTROL LOCATOR AIDS		AC				AC=Until superseded or no longer needed			
BOR1965	3.1.013	EMPLOYMENT CONTRACTS	Includes all contracts, prior to August 31, 2015 and after September 1, 2015.	AC	7			AC=Expiration or termination of the contract according to its terms.		Government Code, 441.1855	



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



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BOR1974	5.1.005	POSTAGE RECORDS		FE	3						
BOR1971	5.2.002	BUILDING CONSTRUCTION PROJECT FILES		AC	10			AC=Completion of project.	O		
BOR1973	5.3.007	BID DOCUMENTATION		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.	
CHA1269	1.1.000	FINANCIAL DISCLOSURE AND CONFLICT OF INTEREST AFFIDAVITS		FE	3						
CHA2145	1.1.069	PROJECT MANAGEMENT TRACKING SYSTEM		AC	3			AC=Project completed.			
CHA2144	3.1.019	EXECUTIVE OFFICER PERFORMANCE - WORKPLANS AND APPRAISALS		FE	3						29 CFR 1620.32(c)



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SCM1649	5.4.000	RISK ASSESSMENT AND MONITORING PLANS		US	5						
CON1737	1.1.066	REPORTS - BIENNIAL OR ANNUAL AGENCY (NARRATIVE)		AC	6			AC=September 1 of odd-numbered calendar years.	I	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.	
APS1215	3.2.002	EMPLOYEE EARNINGS RECORDS		FE	4						40 TAC 815.106(i).
APS1218	4.2.001	CASH DEPOSIT VOUCHERS		FE	3						
APS1219	4.2.006	GENERAL JOURNAL VOUCHERS		FE	3						
APS1214	4.7.012	SIGNATURE AUTHORIZATIONS		AC	3			AC=The end of the fiscal year in which the signature authorization is superseded.			
APS1743	5.1.005	POSTAGE RECORDS		FE	3						
APS1220	5.2.014	INVENTORY-ANNUAL PHYSICAL		FE	3						



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					Years	Months	Days				
CON1282	1.1.000	REQUESTS FOR BUDGET CHANGES		FE	3						
CON1285	1.1.004	LEGISLATIVE APPROPRIATION REQUESTS		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.	
CON1782	3.1.013	EMPLOYMENT CONTRACTS		AC	7			AC=Termination of employment of Chief Administrative Officer.		These contracts are for Chief Administrative Officers.	Government Code, 441.1855
CON1273	3.2.003	FEDERAL TAX RECORDS		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).



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CON1289	4.2.000	ACCOUNTING VOUCHERS		FE	3						
CON1275	4.5.000	SYSTEM ADMINISTRATION POSTED BUDGETS		FE	50				I		
CON1274	4.5.001	WORKSHEETS FOR PREPARING FISCAL REPORTS		FE	9						
CON1283	4.5.001	WORKPAPERS - BUDGET		FE	3						
CON1278	4.5.002	INTERNAL FISCAL MANAGEMENT REPORTS	Includes Annual Financial Reports.	PM					I		



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					Years	Months	Days				
CON1280	4.5.006	ANNUAL OPERATING BUDGETS		FE	50				O	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. Required by the General Appropriations Act.	
TRA1739	5.6.001	AIRPLANE FLIGHT LOGS		LA	3					Records are maintained by the office of the State Aircraft Pooling Board.	
TRA1738	5.6.002	AIRPLANE PASSENGER LISTS		FE	3						
ECM2108	1.1.019	PUBLIC RELATIONS RECORDS		FE	5				O		
ECM2109	1.3.002	PUBLICATION DEVELOPMENT FILES		AV					O		



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GPS1772	1.1.000	DONOR RECORDS		AC	5			AC=Expiration or termination of the instrument according to its terms.	O		
GPS1776	1.1.000	CHANCELLOR'S COUNCIL MEMBERSHIP LIST		US							
GPS1777	1.1.000	BUILDING NAMING INVENTORY		FE	10				O		
GPS2017	1.2.012	RECORDS INVENTORY WORKSHEETS		US							
GPS1753	3.2.003	FEDERAL TAX RECORDS		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).
GPS2004	4.2.001	CASH DEPOSIT VOUCHERS		FE	3						
GPS1588	4.7.002	BANK STATEMENTS		FE	5						
GPS1575	4.7.004	ESTATES OR ASSETS HELD IN TRUST BY OTHERS		LA	10						
GPS1576	4.7.004	ENDOWMENTS - PERPETUAL OR TERM		LA	5						



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GPS1578	4.7.004	CHARITABLE TRUSTS/ POOLED INCOME FUND/ REMAINDER INTERSTS IN LIFE ESTATES		LA	5						
GPS1583	4.7.004	CAPITAL ASSET RECORDS - PROPOSED, CONTINGENT AND REVOCABLE FILES		AC	3			AC=After determination of gift status.			
GPS2106	4.7.004	CAPITAL ASSET RECORDS - CURRENT PURPOSE GIFTS		LA	5						
OPA1685	1.1.019	PUBLIC RELATIONS RECORDS		FE	5				O		
OPA1678	1.3.002	PUBLICATION DEVELOPMENT FILES		AV					O		
SPE1555	1.1.000	OFFICIAL OCCASION RECORDS		FE	5						
SPE2020	1.3.002	PUBLICATION DEVELOPMENT FILES		AV					O		
FED1823	1.1.020	PUBLIC INFORMATION REQUESTS - NOT EXEMPTED		AC	1			AC=Date request fulfilled.			



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FED1824	1.1.021	PUBLIC INFORMATION REQUESTS - EXEMPTED		AC	2			AC=Date of notification that records are exempt.			
FED1850	4.5.005	EXTERNAL FISCAL REPORTS		FE	3						
FIN2028	4.5.001	WORKSHEETS FOR PREPARING FISCAL REPORTS		FE	3						
FIN2025	4.7.010	LONG-TERM LIABILITY RECORDS		AC	3			AC=Retirement of Debt; Bonds have been paid in full and presented to UT System Administration.			
FIN2027	5.3.009	REQUESTS FOR INFORMATION		AC				AC=Date of direct purchase, issuance of request for bids, or decision not to proceed with the procurement, as applicable.			
HEA1344	1.1.000	MEETING AGENDA AND MINUTES - COUNCIL OF HEALTH INSTITUTIONS		AC	10			AC=When Agenda and Minutes and Finalized.	I	ARCHIVES NOTE: Not a governmental body as defined by Government Code Chapter 551.	Government Code Chapter 551.
HEA2161	3.1.000	PERSONNEL FILES - HEALTH INSTITUTION PRESIDENTS		AC	5			AC=Termination of employment.			



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HEA2116	3.1.014	PRESIDENTIAL SEARCH COMMITTEE RECORDS - HEALTH INSTITUTIONS		AC	2			AC=When applicant accepts or declines the position.		CAUTION: Does not include criminal history checks. SEE item number 3.1.026.	29 CFR 1602.49(a).
HEA1982	3.3.023	REIMBURSABLE ACTIVITIES, REQUESTS AND AUTHORIZATIONS TO ENGAGE IN		FE	3						
HEA1985	4.1.001	ACCOUNTS PAYABLE INFORMATION		FE	3						
HEA1986	4.1.007	TRANSFERS OR BUDGET REVISIONS		FE	3						
HEA1987	4.4.002	ACCOUNTS RECEIVABLE LEDGERS		FE	3						
HEA1988	4.4.003	ACCOUNTS PAYABLE LEDGERS		FE	3						
HEA1992	4.7.007	DETAIL CHART OF ACCOUNTS		FE	3						
HEA1993	5.1.004	MAIL AND TELECOMMUNICATIONS LISTINGS		US							



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HUB1261	1.1.066	REPORTS - BIENNIAL OR ANNUAL AGENCY (NARRATIVE)		AC	15			AC=September 1 of odd-numbered calendar years.	I	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.	
ISPA2083	1.1.010	DIRECTIVES		US	10						
ISPA2029	1.1.019	PUBLIC RELATIONS RECORDS		FE	10				O		
ISPA2085	1.1.024	PLANS AND PLANNING RECORDS		AC	10			AC=Decision made to implement or not to implement result of planning process.	O		
ISPA2086	1.1.065	REPORTS AND STUDIES (NON-FISCAL) -- RAW DATA		AV							
ISPA2087	1.1.067	REPORTS AND STUDIES (NON-FISCAL)		FE	10				O		
ISPA2030	1.2.012	RECORDS INVENTORY WORKSHEETS		US							
ISPA2031	1.3.002	PUBLICATION DEVELOPMENT FILES		AV					O		



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ISPA2032	2.1.001	PROCESSING FILES		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.			
ISPA2033	2.1.002	MASTER FILES		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.			



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					Years	Months	Days				
ISPA2034	2.1.011	FINDING AIDS, INDEXES, AND TRACKING SYSTEMS		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.	
ISPA2035	4.7.007	DETAIL CHART OF ACCOUNTS		FE	3						
MED1462	1.1.000	STATUS REPORTS AND APPLICANTS MATERIAL FOR ADMISSION TO MEDICAL AND DENTAL SCHOOLS		US							
MED1463	1.1.000	STUDENT APPLICATIONS TO MEDICAL AND DENTAL SCHOOLS		FE	10					Microfilming discontinued in 2003. Master microfilm stored at State Records Center Records after 2003 stored in FileNet.	
MED2094	3.3.025	JOB PROCEDURE RECORDS		US	3						
MED2096	3.4.004	OVERTIME AUTHORIZATIONS		FE	2						
MED2097	4.2.001	CASH DEPOSIT VOUCHERS		FE	3						



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MED1460	5.1.001	JOINT ADMISSION MEDICAL PROGRAM (JAMP) APPLICATIONS AND STUDENT CONTRACTS -- MEDICAL SCHOOLS		AC	7			AC=Expiation or termination of the instrument according to its terms.		Extended retention from AC+4 to AC+7 for consistent series in Mar2018.	
MED2099	5.1.004	MAIL AND TELECOMMUNICATIONS LISTINGS		US							
MED2100	5.1.007	REQUISITIONS FOR IN-AGENCY/INTERAGENCY COPY/PRINTING SERVICE		AV							
MED2101	5.2.014	INVENTORY-ANNUAL PHYSICAL		FE	3						
MED2102	5.2.015	INVENTORY, NOTICES OF EQUIPMENT REMOVED FROM		FE	3						
MED2105	5.3.004	ORDER - ACKNOWLEDGMENTS		AV							
MED2103	5.3.005	PACKING SLIPS		AV							



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					Years	Months	Days				
MED2104	5.3.007	BID DOCUMENTATION		AC	7			Executed, renewed, or amended		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. Bid docs should be reflected as three record series with different retention periods. For example: MED2104 FE+3 executed, renewed, or amended on or before 8/31/2015 MED2104a AC+7 executed, renewed, or amended on or after 9/1/2015. MED2104b AC+2 unsuccessful bids Or reflect one record series with the greater retention period of AC+7.	



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MED2104a	5.3.008	Unsuccessful bid documentation	Bid documentation for which no award was extended	AC	2			After award		Complementary to MED2014	
OEB1307	1.1.000	CONTRACTED CARRIER CORRESPONDENCE AND REPORTS		FE	7						
OEB1494	1.1.038	SURVEYS-EMPLOYEE BENEFITS		AC	3			AC=Final disposition of summary report.			
OEB2148	1.1.065	EMPLOYEE BENEFITS MEMBERS ISSUES		AC	2			AC=Resolution of issue.			
OEB2149	1.3.000	EMPLOYEE INSURANCE AND RETIREMENT EMPLOYEE REFERENCE MATERIALS		AC				AC=Until superseded or obsolete.			
OEB2150	2.1.002	EMPLOYEE BENEFITS SOFTWARE MASTER FILES		AC	1			AC=Completion of upgrade, migration, or verification of audit trail.			
OEB2151	2.1.002	EMPLOYEE BENEFITS SOFTWARE DATABASE FILES		AC	20			AC=Completion of upgrade, migration, or verification of audit trail.			
OEB1304	2.2.011	EMPLOYEE BENEFITS DATA ENTRY LOGS		AC				AC=When reconciliation confirmed.			



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OEB2152	3.1.000	EMPLOYEE BENEFITS MANDATED BENEFITS COORDINATION AND SECONDARY PAYEE CLAIMS		AC	3			AC=Resolution of claim.		Revised Dec 2017 per approved amendment	
OEB2153	3.1.000	RETIREMENT LOAN INFORMATION		AC				AC=After loan has been paid.			
OEB2154	3.1.000	EMPLOYEE BENEFITS MEDICARE RECORDS		AC	6			AC=Resolution of claim.			
OEB1314	3.1.011	Employee Insurance Records (including Affordable Care Act and Cobra records)	Includes all employee insurance records.	AC	6			AC= Termination of coverage.		Revised Dec 2017 per approved amendment	
OEB1316	3.3.000	INSURANCE CONTRACTS		AC	15			AC=End of contract.			
OEB1492	3.3.004	RETIREMENT PLAN DOCUMENTS		US	1						29 CFR 1627.3(b)(2).
OEB2155	4.2.007	EMPLOYEE BENEFITS PROCARD AND EXPENDITURE VOUCHERS		FE	7						
OEB1309	4.5.002	FINANCIAL STATEMENTS		FE	7						



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OEB2156	4.7.002	EMPLOYEE BENEFITS SPECIAL CLAIMS		AC	5			AC=Resolution of claim.			
OEB2157	4.7.005	EMPLOYEE BENEFITS INSURANCE ELECTRONIC MEDICAL CLAIMS		AC	20			AC=Resolution of claim.			
OEB1302	5.1.001	EMPLOYEE BENEFITS INSURANCE CONTRACTS		AC	7			AC=Expiration or termination of instrument.		Contracts should be reflected as two record series with different retention periods. For example: OEB1302 AC+4 executed, renewed, or amended on or before 8/31/2015 OEB1302a AC+7 executed, renewed, or amended on or after 9/1/2015. Or reflect one record series with the greater retention period of AC+7 (changed Mar 2018)	
OEB2158	5.1.001	LIFE INSURANCE CONTRACTS AND RETIREMENT CONTRACTS		AC	30			AC=Expiration or termination of the instrument according to its terms.			



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OEB2159	5.2.009	EQUIPMENT INVENTORY DETAIL REPORTS AND FORMS		FE	3						
OEB1311	5.3.007	BID DOCUMENTATION		AC	7			After award is executed, renewed, or amended.		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. Bid docs should be reflected as three record series with different retention periods. unsuccessful bids Or reflect one record series with the greater retention period of AC+7.	
OEB1311a	5.3.008	BID DOCUMENTATION	Documentation for unsuccessful bids	AC	2			After award is executed, renewed, or amended.		Complementary to OEB3111	
OEB2160	1.1.002	AUDITS		AC	7			AC=Publication or release of final audit findings.			



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OES2068	2.1.002	MASTER FILES		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.	
OES1787	3.1.001	APPLICATIONS FOR EMPLOYMENT-NOT HIRED		FE	2						29 CFR 1602.49(a).
OES2050	3.1.002	APPLICATIONS FOR EMPLOYMENT HIRED		AC	5			AC=Separation or termination of employment.			
OES2051	3.1.011	EMPLOYEE INSURANCE RECORDS - CURRENT EMPLOYEES		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.	



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					Years	Months	Days				
OES2077	3.1.011	EMPLOYEE INSURANCE RECORDS		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.	
OES2078	3.1.011	EMPLOYEE INSURANCE RECORDS - RETIRED AND DECEASED EMPLOYEES		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.	
OES2052	3.1.012	EMPLOYMENT OPPORTUNITY ANNOUNCEMENTS		FE	2						29 CFR 1602.49(a)
OES2076	3.1.014	EMPLOYMENT SELECTION RECORDS		FE	2					CAUTION: Does not include criminal history checks. SEE item number 3.1.026.	29 CFR 1602.49(a).



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OES2080	3.1.029	EMPLOYMENT ELIGIBILITY, DOCUMENTATION OR VERIFICATIN OF FEDERAL REPORTING FORM (INS I-9)		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).
OES2081	3.1.031	EMPLOYEE BENEFITS - OTHER THAN INSURANCE		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.	
OES2079	3.2.009	STATE DEFERRED COMPENSATION RECORDS		AC	5			AC = All accounts with a vendor or vendors for the individual participant have been closed.			



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OES2054	3.1.018	GRIEVANCE RECORDS		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.	
OES2055	3.1.019	PERFORMANCE APPRAISALS		AC	5			AC=Separation or termination of employment.			29 CFR 1620.32(c).
OES2056	3.1.020	PERSONNEL CORRECTIVE ACTION DOCUMENTATION		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.	



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					Years	Months	Days				
OES2057	3.1.021	PERSONNEL DISCIPLINARY ACTION DOCUMENTATION		AC	5			AC=Separation or termination of employment.			
OES2058	3.1.022	PERSONNEL INFORMATION OR ACTION FORMS		AC	5			AC=Separation or termination of employment.			29 CFR 1602.49(a).
OES2059	3.1.023	POSITION/JOB DESCRIPTIONS		AC	5			AC=Until superseded or job eliminated.			40 TAC 815.106(i).
OES2061	3.1.026	CRIMINAL HISTORY CHECKS - AUTHORIZATION FORMS		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.	Subchapter F, Chapter 411, Government Code
OES2062	3.1.037	EMPLOYEE RECOGNITION RECORDS		AC	5			AC=Separation or termination of employment.			
OES2063	3.1.038	PUBLIC ACCESS OPTION FORM		AC	75			AC=Until superseded or separation or termination of employment.			Government Code 552.024



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OES2064	3.2.001	EMPLOYEE DEDUCTION AUTHORIZATIONS		AC	5			AC=Separation or termination of employee or after amendment, expiration, or termination of authorization, whichever sooner.			
OES2065	3.2.004	INCOME ADJUSTMENT AUTHORIZATIONS		AC	5			AC=Separation or termination of employee or after amendment, expiration, or termination of authorization, whichever sooner.			29 CFR 516.6(c)
OES2066	3.2.005	W-4 FORMS		AC	5			AC=Until superseded, obsolete, or upon separation of employee.			26 CFR 31.6001-1 (e)(2).
OES1789	3.2.007	UNEMPLOYMENT COMPENSATION RECORDS		AC	5			AC=After closed, terminated, completed, expired or settled.			



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OES2067	3.2.008	DIRECT DEPOSIT APPLICATION/AUTHORIZATIONS		AC	5			AC=Separation or termination of employee or after amendment, expiration, or termination of authorization, whichever sooner.			
OES1792	3.3.001	AFFIRMATIVE ACTION PLANS		FE	5						29 CFR 30.8(e) for apprenticeship records.
OES2069	3.3.010	LABOR STATISTICS REPORTS		FE	3						
OES1853	3.3.011	FORMER EMPLOYEE VERIFICATION RECORDS		AC	75			AC=Separation or termination of employment.			
OES2070	3.3.015	POSITIONS/JOB CLASSIFICATION REVIEW FILE		US	3						
OES2071	3.3.022	TEXAS WORKFORCE COMMISSION (TWC) REPORTS		FE	3						
OES2072	3.3.025	JOB PROCEDURE RECORDS		US	3						



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OES2073	3.3.026	AGENCY STAFFING REPORTS		US	3						
OES1497	3.3.031	EEO REPORTS AND SUPPORTING DOCUMENTATION		FE	3						29 CFR 1602.32, 1602.39, 1602.41, 1602.48, and 1602.50.
OES2074	3.3.032	EQUAL PAY RECORDS		FE	3						29 CFR 1620.32
OES2075	4.2.002	CASH RECEIPTS		FE	3						
OES1791	4.2.003	DAILY CASH RECEIPTS LOGS		FE	3						
FAC1723	1.1.067	REPORTS AND STUDIES (NON-FISCAL)		AC	6			AC=Submission of report.	O		
FAC1721	5.2.019	SERVICE ORDERS		AC	5			AC=Service request completed.			
FAC1722	5.4.012	SECURITY ACCESS RECORDS		AC	2			AC=Key Returned			
OFPC1323	4.7.000	FISCAL RECORDS FOR CONSTRUCTION PROJECTS		AC	11			AC=Close of project.		The project close date is based on the fiscal year of the Final Payment to the contractor.	
OFPC1322	5.2.002	BUILDING CONSTRUCTION PROJECT FILES		AC	11			AC=Completion of project.	O		



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OFPC1325	5.2.003	BUILDING PLANS AND SPECIFICATIONS		LA					O		
OFPC1948	5.2.028	BUILDING CONTRACTS		LA	10				O	SEE ALSO item numbers 5.2.002 and 5.2.003	
OGC1473	1.1.000	PATENTS ISSUED/RELEASED		AC				AC=Life of patent (17-20 years, depending on when patent is issued).			35 USC Sec. 154.
OGC2141	1.1.000	PROFESSIONAL LIABILITY ENROLLMENT, CHANGES, AND RESIGNATION		AC	20			AC=Date of enrollment.			
OGC1861	1.1.014	LEGAL OPINIONS AND ADVICE		AC	3			AC=When closed by attorney.	O		
OGC2118	1.1.020	PUBLIC INFORMATION REQUESTS - NOT EXEMPTED		AC	2			AC=After request has been satisfied.			
OGC2119	1.1.021	PUBLIC INFORMATION REQUESTS - EXEMPTED		AC	2			AC=Date of notification that records are exempt.			



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OGC1472	1.1.048	LITIGATION FILES - GENERAL LAW		AC	3			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).	O		
OGC1862	1.1.048	LITIGATION FILES - HEALTH LAW		AC	20			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).	O		



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					Years	Months	Days				
OGC1863	1.1.048	LITIGATION FILES - CLAIMS AND BANKRUPTCY		AC	10			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).	O		
OGC2036	3.4.004	OVERTIME AUTHORIZATIONS		FE	2						
OGC2038	4.1.003	CANCELED CHECKS AND BANK STATEMENTS		FE	3						
OGC2115	4.7.005	CLAIMS & BANKRUPTCY FILES (NONLITIGATION)		AC	5			AC=Resolution of claim.			
OGC2041	4.7.012	SIGNATURE AUTHORIZATIONS		AC	3			AC=The end of the fiscal year in which the signature authorization is superseded.			
RTT1805	1.1.002	AUDITS		AC	7			AC=Publication or release of final audit findings.			



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RTT1996	1.1.067	REPORTS AND STUDIES (NON-FISCAL)		FE	3				O		
RTT1997	5.2.014	INVENTORY - ANNUAL PHYSICAL		FE	3						
RTT1998	5.2.015	INVENTORY, NOTICES OF EQUIPMENT REMOVED FROM		FE	3						
RTT1999	5.2.021	SURPLUS PROPERTY SALE REPORTS		FE	3						
RTT2000	5.2.023	YEAR-TO-DATE ACTIVITY (INVENTORY LISTING)		FE	3						
RTT2001	5.2.026	FACILITIES RESERVATION LOGS		FE	2						
SCM2048	1.1.067	REPORTS AND STUDIES (NON-FISCAL)		AC	3			AC=Submission, completion of Report	O		
SCM2044	1.2.012	RECORDS INVENTORY WORKSHEETS		US							
SCM2045	3.4.004	OVERTIME AUTHORIZATIONS		FE	2						
SCM2046	3.4.008	SICK LEAVE POOL DOCUMENTATION		FE	3						



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OGR1332	1.1.027	PROPOSED LEGISLATION		AC	1			AC=After current legislative session ends (typically May 31)			
EHS1640	5.4.000	SYSTEM HAZARD REPORTS		AC	3			AC=Release of report.			
EHS1641	5.4.002	EVACUATION PLANS		US							
EHS1639	5.4.003	INSPECTION RECORDS		AC	3			AC=Date of the correction of the deficiency, if inspection reveals a deficiency.			
EHS1642	5.4.007	HAZARDOUS MATERIAL TRAINING RECORDS			5						Texas Health and Safety Code 502.009(g)
RMI1699	4.7.005	SYSTEMWIDE INSURANCE CLAIM FILES		AC	4			AC=Resolution of claim.			



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RM1697	5.1.013	SYSTEMWIDE INSURANCE POLICIES		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.			
RRF1732	1.1.067	REPORTS AND STUDIES (NON-FISCAL)		FE	7				O		
RRF1727	4.1.002	BILLING DETAIL		FE	3					CAUTION: Does not include long distance telephone billing detail. SEE: item numbers 5.5.001, 5.5.006 and 5.5.007.	
RRF1709	4.2.000	WORKERS COMPENSATION - ACCOUNTING RECORDS		FE	3						
RRF1726	4.2.000	VOUCHERS AND RELATED INFORMATION		FE	3						
RRF1731	4.2.000	VOUCHERS - SETTLEMENTS		FE	3						



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RRF1728	4.5.002	INTERNAL FISCAL MANAGEMENT REPORTS		FE	30					Annual statements must be kept to compile statistical information.	
RRF1725	4.7.007	DETAIL CHART OF ACCOUNTS		FE	3						
RRF1710	5.4.000	MONTHLY PREMIUM TRANSFERS		FE	3						
RWC1708	4.7.005	CLAIM FILES - WORKER'S COMPENSATION		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.	
RWC1707	5.4.001	ACCIDENT REPORTS AND ASSOCIATED DOCUMENTATION		CE	10					The Texas Department of Insurance retains copies for 50 years. Used in preparing analyses of program experience.	29 CFR 1904.33.
OTIS1507	1.1.000	INFORMATION TECHNOLOGY PROJECT AND SYSTEMS DOCUMENTATION		AV							



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OTIS1519	1.1.000	VIDEOCONFERENCE SCHEDULING FORMS		FE	2						
OTIS2122	1.1.069	REPORTS - ACTIVITY			1					CAUTION: See item number 1.1.064.	
OTIS2123	1.2.001	RECORDS MANAGEMENT PROGRAM COMPLIANCE RECORDS		FE	10						
OTIS2121	1.2.005	RECORDS RETENTION SCHEDULE (SLR 105)		US						Original is retained by the State and Local Records Management Division, Texas State Library and Archives Commission.	
OTIS2140	1.3.002	PUBLICATION DEVELOPMENT FILES		AV					O		



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OTIS2127	2.1.002	MASTER FILES		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.			
OTIS2128	2.1.007	SOFTWARE PROGRAM		AC				AC=Until electronic records are transferred to and made usable in a new software environment or there are no electronic records being retained to meet an approved retention period that require the software to be retrieved and read.		CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.	13 TAC 6.94.



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OTIS1518	2.1.008	HARDWARE DOCUMENTATION		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.		CAUTION: Software needed for access to electronic must be retained for the period of time required to access the records.	13 TAC 6.94.
OTIS1508	2.1.009	TECHNICAL DOCUMENTATION		AC				AC=Until electronic records are transferred to and made usable in a new hardware or software environment with new documentation or there are no electronic records being retained to meet an approved retention period that require the documentation to be retrieved and read.		CAUTION: Software needed for access to electronic must be retained for the period of time required to access the records.	13 TAC 6.94.



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					Years	Months	Days				
OTIS2129	2.1.011	FINDING AIDS, INDEXES, AND TRACKING SYSTEMS		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.	
OTIS1526	2.2.001	SYSTEM MONITORING RECORDS		AV							
OTIS2130	2.2.001	SYSTEM MONITORING RECORDS		AV							
OTIS2131	2.2.002	CHARGEBACK RECORDS TO DATA PROCESSING SERVICES USERS		FE	3						
OTIS2132	2.2.004	COMPUTER JOB SCHEDULES AND REPORTS				3					
OTIS2133	2.2.010	DATA PROCESSING POLICIES AND PROCEDURES		US	3					CAUTION: Does not include technical documentation of procedures necessary for reading or processing of electronic records. SEE item number 2.1.009.	
OTIS2134	2.2.012	OUTPUT RECORDS FOR COMPUTER PRODUCTION		AV							



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					Years	Months	Days				
OTIS2135	2.2.013	QUALITY ASSURANCE RECORDS		AC				AC=No longer needed as an audit trail for any records modified.			
OTIS2136	2.2.016	SOFTWARE REGISTRATIONS, WARRANTIES AND LICENSE AGREEMENT		LA	3						
OTIS2141	5.2.008	Equipment History	Agreements or contracts between the agency and equipment vendor to provide maintenance service for equipment executed before August 31, 2015 or after September 1, 2015.	LA	7					Updated Dec 2017 per approved amendment	
OTIS2142	5.4.013	DISASTER PREPARDNESS AND RECOVERY PLAN		US							
OTIS2143	5.5.001	TELECOMMUNICATIONS BILLING DETAIL		FE	3						
OTIS1525	5.4.012	SECURITY ACCESS RECORDS		AC	2			AC=Until superseded, date of expiration, or date of termination, whichever sooner.			
OTIS1509	5.5.003	STATION ACTIVITY REPORTS		AV							



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



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POL1952	1.1.067	REPORTS AND STUDIES (NON-FISCAL)		PM					O		
POL2003	1.1.067	REPORTS - ANNUAL INSPECTIONS OF COMPONENT INSTITUTIONS		CE	10				O		
POL1537	3.1.000	PERSONNEL FILES - COMMISSIONED OFFICERS		AC	5			AC=Termination or resignation of officers.			
POL1771	3.1.000	PERSONNEL FILES - OFFICE OF DIRECTOR OF POLICE		AC	5			AC=Termination of employment.		Forward to Personnel Office for Officers, Admin, and Guards at termination.	
POL1766	3.1.026	CRIMINAL HISTORY CHECKS		AC				AC=The criminal history record has served the immediate purpose for which it was obtained.			See Texas Government Code Chapter 411, Subchapter F.
POL1761	3.3.027	APTITUDE AND SKILLS TESTS		US	3						29 CFR 1602.49.
POL1528	3.3.028	APTITUDE AND SKILLS TESTS (TEST PAPERS)		CE	3						29 CFR 1602.49.
POL1770	5.2.017	PROPERTY LOGS AND CARDS FOR LOST AND FOUND PROPERTY		FE	3						



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POL1531	5.4.011	VISITOR CONTROL REGISTERS		FE	3						
POL1538	5.4.012	SECURITY ACCESS RECORDS		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.	
POL1529	5.6.005	VEHICLE USE REPORTS		FE	3						
REA1212	1.1.000	REAL ESTATE CLOSING PAPERS		PM							
REA2113	1.1.000	COMPONENT PROPERTIES AND TRUST FUND PROPERTIES - WORKING PAPERS		AC	3			AC=termination or expiration of lease or contract			
REA2110	2.1.011	REAL ESTATE FILING SYSTEMS		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.	



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SIS2146	1.1.000	TECHNOLOGY ADVISORY GROUPS MEETING MINUTES, AGENDAS, AND SUPPORTING DOCUMENTATION		AC	3			AC=After minutes are transcribed.			
SIS1907	1.1.062	MEETINGS - SUPPORTING DOCUMENTATION		FE	2				I		
SIS1900	5.1.001	CONTRACTS AND LEASES		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.	
STM1912	1.1.000	COMPACTS		FE	20				O		
STM1913	1.1.000	ACCOUNTABILITY REPORTS		AC				AC=Statute of limitations.	O		
STM1914	1.1.000	PROJECTS/EVENTS/INITIATIVES		AC	5			AC=Conclusion or termination of projects, event, or initiative.			



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STM1915	1.1.000	EXTERNAL COMMITTEE MEMBERSHIP, ADVISORY BOARDS AND ASSOCIATIONS		AV							
STM1918	1.1.055	STRATEGIC PLANS		AC	6			AC=September 1 of odd-numbered calendar years.	I	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.	
STM1926	1.1.068	REPORTS ON PERFORMANCE MEASURES		AC	6			AC=September 1 of odd-numbered calendar years			



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					Years	Months	Days				
STM1927	1.3.001	STATE PUBLICATIONS		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.	Government Code 441.101-441.106
STM1928	1.3.002	PUBLICATION DEVELOPMENT FILES		AV					O		
STM1920	3.1.000	PERSONNEL RECORDS		AC	5			AC=Termination of employment.			
STM1921	4.2.000	TRAVEL RECORDS		FE	3						



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ACC1353	1.1.000	UNIT FILES		AC	10			AC=After termination of the unit, the file is taken offsite and held for 10 years.			
ACC1364	1.1.000	DOCUMENT CONTROL		US							
ACC1368	1.1.000	UNIVERSITY LANDS ACCOUNTING OFFICE REPORTING MANUAL		US							
ACC1369	1.1.000	GAS AND OIL CONTRACTS		PM							Government Code, 441.1855
ACC1370	1.1.000	WELL RECORDS (BIN CARDS)		PM							
ACC1371	5.1.000	TAKE IN KIND (TIK) OIL AND GAS CONTRACTS		AC	7			AC=termination or expiration of contract term		Updated Dec 2017 per approved amendment	Government Code, 441.1855
ACC1386	1.1.000	WELL RECORDS (PLAT BOOKS)		PM							



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					Years	Months	Days				
ACC1359	2.1.007	SOFTWARE PROGRAMS		AC				AC=Until electronic records are transferred to and made usable in a new software environment or there are no electronic records being retained to meet an approved retention period that require the software to be retrieved and read.		CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.	13 TAC 6.94.
ACC1363	4.1.000	UNIVERSITY LANDS ACCOUNTING OFFICE INVENTORY		FE	3						
ACC1374	4.1.003	CANCELLED CHECKS/STUBS/WARRANTS/DRAFTS		FE	10						
ACC1355	4.2.000	GAS PURCHASE STATEMENTS		FE	3						
ACC1358	4.2.000	OIL ROYALTY LEDGERS AND OIL PENALTY LEDGERS		FE	10						
ACC1360	4.2.000	OIL CHARGE AND OIL PENALTY CHARGE VOUCHERS		FE	10						



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					Years	Months	Days				
ACC1373	4.2.000	CASH CONTROL		FE	10						
ACC1379	4.2.000	REFUND VOUCHERS - ULAO COPY		FE	10						
ACC1385	4.2.000	SURFACE LEDGERS		FE	10						
ACC1387	4.2.000	SURFACE VOUCHERS (BRINE, SALT WATER, DISPOSAL, GRAZING, SURFACE AND WATER)		FE	10						
ACC5	4.2.000	OIL CHARGE AND PENALTY CHARGE VOUCHERS		FE	10						
ACC6	4.2.000	GAS CHARGE AND PENALTY CHARGE VOUCHERS		FE	10						
ACC7	4.2.000	OIL ROYALTY LEDGERS & OIL PENALTY LEDGERS		FE	10						
ACC8	4.2.000	INCOME AND INCOME PENALTY VOUCHERS		FE	10						
ACC9	4.2.000	GAS ROYALTY LEDGERS AND PENALTY LEDGERS		FE	10						
ACC1378	4.2.001	CASH DEPOSIT VOUCHERS		FE	10						



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					Years	Months	Days				
ACC4	4.2.001	DEPOSIT VOUCHERS		FE	10						
ACC1375	4.2.006	JOURNAL VOUCHERS		FE	10						
ACC1376	4.3.002	CASH DEPOSIT REGISTERS		FE	10						
ACC1380	4.3.003	EXPENDITURES JOURNALS OR REGISTERS		FE	10					See Note 5. Previous Formerly Remittance by Payor AIN=ULA31	
ACC1356	4.4.000	GAS CHARGE AND GAS PENALTY CHARGE VOUCHERS (WORKING PAPERS)		FE	10						
ACC1372	4.4.000	STATEMENT OF ACCOUNT		FE	10						
ACC1384	4.4.000	INCOME AND INCOME PENALTY VOUCHERS (WORKING PAPERS)		FE	10						
ACC1377	4.4.002	ACCOUNTS RECEIVABLE LEDGERS	Related to West Texas oil and gas operations.	FE	3					Updated Dec 2017 per approved amendment	
ACC1	4.5.000	TEXAS RAILROAD COMMISSION PRODUCTION REPORTS		FE	10						



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ACC1383	4.5.000	SUMMARIES-PENALTY AND INTEREST ON LATE PAYMENTS		FE	15						
ACC2	4.5.000	PRICE BULLETINS		FE	15						
ACC1357	4.5.001	WORKSHEETS FOR PREPARING FISCAL REPORTS FORMERLY TRIAL BALANCES		FE	10					See Note 5. Previous AIN=ULA46	
ACC1351	4.5.002	INTERNAL FISCAL MANAGEMENT REPORTS		FE	10					See Note 5. Previous AIN=ULA19	
ACC3	4.5.002	INTERNAL FISCAL MANAGEMENT REPORTS		FE	10						
ACC1382	4.7.002	BANK STATEMENTS		FE	3					See Note 5. Previous AIN=ULA33	
ACC1381	4.7.007	DETAIL CHART OF ACCOUNTS		FE	10					See Note 5. Previous AIN=ULA32	
ACC1350	5.1.001	CONTRACTS AND LEASES		AC	50			AC=Expiration or termination of the instrument according to its terms.	I	SEE item number 5.2.028 for building construction contracts and item number 5.1.017 for contract logs.	Government Code 441.1855



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LAC421	4.2.000	REMITTANCE BY DOCUMENT (UT-3)		FE	10						
LLM1600	1.1.000	WATER AND HARD MINERALS PROSPECT PERMITS AND SUPPORTING DATA		PM							
LLM1601	1.1.000	PUGH CLAUSE DATA - DEVELOPMENT COMPLIANCE	Information used for exploration and development of oil and gas resources.	AV						Previous AIN=LLM23.	
LLM1604	1.1.000	TECHNICAL WELL FILES		PM							
LLM1607	1.1.000	UNPLUGGED WELL REPORT		US						Previous AIN=LLM31.	
LLM1609	1.1.000	WELL TICKETS	Historical information used for exploration and development of oil and gas resources.	AV						Previous AIN=LLM36.	
LLM1612	1.1.000	DEVELOPMENT REPORT		US						Previous AIN=LLM03.	
LLM1613	1.1.000	GEOPHYSICAL CONTOUR MAPS	Source for evaluating acreage for oil and gas leases.	AV						Previous AIN=LLM05.	
LLM1614	1.1.000	GEOPHYSICAL SURVEY PERMITS AND SUPPORTING DOCUMENTS	Information used for exploration and development of oil and gas leases	AV						Previous AIN=LLM06.	



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LLM1621	1.1.000	ELECTRIC LOGS		PM							
LLM1623	1.1.000	REDUCED ROYALTY LEASE DATA		AV						Previous AIN=LLM24.	
LLM1605	4.5.005	EXTERNAL FISCAL REPORTS	Data used in compiling weekly activity report and to show oil and gas gatherers.	PM						Information used for exploration and development of oil and gas resources. Previous AIN=LLM28	
LLM1599	5.1.000	PRODUCER AUTHORITY AND CERTIFICATION OF COMPLIANCE FORM			5					Previous AIN=LLM18.	
LLM1603	5.1.000	SALT WATER DISPOSAL CONTRACTS		AC	7			AC=Expiration or termination of the instrument according to its terms.		Previous AIN=LLM26. Extended from AC+4 to +7 per regulation in 2017	
LLM1608	5.1.000	WEEKLY LETTER	Report provided to University Departments detailing oil and gas resources and compliance.	PM						Previous AIN=LLM3.	
LLM1611	5.1.000	COMMINGLING PERMITS		AC	4			AC=Expiration or Termination of the instrument according to its terms.		Previous AIN=LLM02.	



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LLM1615	5.1.000	LACT UNIT INSTALLATION PERMITS		AC	1			AC=When Terminated.		Previous AIN=LLM09.	
LLM1616	5.1.000	LEASE MAPS	Used for exploration and compliance.	US						Maps are paper and Mylar film. Used for exploration and compliance. Previous AIN=LLM11.	Texas Education Code 66.77.
LLM1617	5.1.000	LEASE SALE INFORMATION		AV						Previous AIN=LLM12.	
LLM1618	5.1.000	LEASE SALE NOMINATIONS INFORMATION	Confidential information used to compile listing of tracts to be offered to be offered for oil and gas leasing.		5					Previous AIN=LLM13	
LLM1619	5.1.000	OIL AND GAS TABULATIONS	Historical data used for monitoring field production trends.		75					Previous AIN=LLM17.	
LLM1620	5.1.000	LEASE SALE RESULTS	Historical reference data of oil and gas leasing.	PM						Previous AIN=LLM14.	
LLM1624	5.1.000	WATER LEASE TECHNICAL DATA		PM						Previous AIN=LLM33.	
LLM1625	5.1.000	UNDERGROUND STORAGE LEASE TECHNICAL DATA	Historical reference, environmental compliance and exploration and development for facilities.	AC	50			AC = termination or expiration of lease period		Previous AIN=LLM29.	
LLM1626	5.1.000	LEASE CARDS-HISTORICAL	Reference data for oil and gas lease ownership.	AC	5			AC = When Terminated.		Previous AIN=LLM10.	



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LLM1627	5.1.000	LEASE ASSIGNMENT BRIEFS		AC	5			AC=Termination of lease.		Previous AIN=LLM16.	
LLM1610	5.1.001	BRINE LEASE DATA		PM							
LLM1622	5.1.010	LICENSES AND PERMITS FOR NONVEHICLES		AC	2			AC=Expiration date of license or permit.		Previous AIN=LLM15	
LMA1410	1.1.000	WEEKLY EMPLOYEE REPORTS		AV						Previous AIN=LMA35.	
LMA1405	1.1.040	SPEECHES, PAPERS AND PRESENTATIONS		AC	2			AC=End of term or service in agency	O		
LMA1402	1.1.062	MEETINGS - SUPPORTING DOCUMENTATION		FE	3				I		
LMA1396	2.1.007	SOFTWARE PROGRAMS		AC				AC=Until electronic records are transferred to and made usable in a new software environment or there are no electronic records being retained to meet an approved retention period that require the software to be retrieved and read.		CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records. Previous AIN=LMA08	13 TAC 6.94.



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LMA1413	3.1.023	POSITION/JOB DESCRIPTIONS		AC	4			AC=Until superseded or job eliminated.		Previous AIN=LMA26	40 TAC 815.106(i)
LMA1418	3.3.000	PERSONNEL RECORDS		AC	3			AC=Life of retiree.		Previous AIN=LMA21.	
LMA1408	3.4.002	LEAVE STATUS REPORTS		FE	4					Previous AIN=LMA32	
LMA1417	4.1.003	CANCELLED CHECKS/STUBS/WARRANTS/DRAFTS		FE	3					Previous AIN=LMA03	
LMA1414	4.2.001	CASH DEPOSIT VOUCHERS		FE	3					Previous AIN=LMA12	
LMA1389	4.2.003	DAILY CASH RECEIPTS LOGS		FE	3						
LMA1394	4.3.003	EXPENDITURES JOURNALS OR REGISTERS		FE	3					Previous AIN=LMA06	
LMA1400	4.5.000	EXPENDITURE AND OBJECT CODE SUMMARIES		FE	5					Previous AIN=LMA15.	
LMA1416	5.1.004	MAIL AND TELECOMMUNICATIONS LISTINGS		US						Previous AIN=LMA18	
LMA1397	5.1.010	LICENSES AND PERMITS FOR NONVEHICLES		AC	2			AC=Expiration date of license or permit.		Previous AIN=LMA09	



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LMA1401	5.2.014	INVENTORY-ANNUAL PHYSICAL		FE	3					Previous AIN=LMA17	
LMA1411	5.4.001	ACCIDENT REPORTS AND ASSOCIATED DOCUMENTATION		CE	6					The Texas Department of Insurance retains copies of the reports submitted to it for 50 years.	29 CFR 1904.33.
LMA1409	5.6.005	VEHICLE USE REPORTS		FE	3						
LMC1591	1.1.000	CHEMICAL INVENTORY			1						
LMC1593	5.4.000	PESTICIDE DAILY CHEMICAL USE LOG			2					Required by the Texas Department of Agriculture. Previous AIN=LMC03.	
LMC1594	5.4.000	PESTICIDE SPECIMEN LABEL		AV						Required by Environmental Protection Agency's Worker Protection Standards and the Texas Department of Agriculture. Previous AIN=LMC04.	
LMC1595	5.4.000	PESTICIDE AND LICENSE RECORDS - PERMANENT EMPLOYEES			30					Texas Department of Agriculture requires 30-year retention. Previous AIN=LMC05	



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LMC1596	5.4.009	WORKPLACE CHEMICAL LISTS			30						Texas Health and Safety Code, 502.005(d)
LMC1592	5.4.010	MATERIAL SAFETY DATA SHEETS		AC				AC=After sheets are updated or hazardous chemical no longer stored.			
LMI1424	1.1.000	DOSIMETRY REPORTS		AC	30			AC=After termination of employee.		In accordance with Texas regulations for control of radiation. Previous AIN=LMI01.	
LMI1426	1.1.000	LICENSE AND HISTORICAL INFORMATION		AC	5			AC=Termination of project.		Previous AIN=LMI03.	
LMI1428	1.1.000	SITE SURVEYS .			5					In Accordance with Texas Regulations for Control of Radiation. Previous AIN=LMI05	
LMI1425	4.1.000	FINANCIAL RECORDS		AC	5			AC=Termination of project.		Previous AIN=LMI02.	
LMI1427	5.2.000	SHIPPING AND RECEIVING RECORDS		AC	5			AC=Termination of project.		Previous AIN=LMI04.	
LMI1429	5.4.000	WASTE DOCUMENTATION		AC				AC=End of License.		Documents transferred to new waste site. In accordance with Texas regulations for control of radiation. Previous AIN=LMI06.	



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LMS1439	1.1.000	WILDLIFE HARVEST RECOMMENDATIONS	Midland record is sole record. Used for yearly trend analysis.		30					Previous AIN=LMS06.	
LMS1449	1.1.038	CUSTOMER SURVEYS		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.	
LMS1435	4.1.000	GRAZING LESSEES' PAYMENT CALCULATIONS			10						
LMS1442	4.1.000	GRAZING LESSEES' LIVESTOCK CHANGE FORMS		CE	3					Previous AIN=LMS09.	
LMS1443	4.1.000	LIVESTOCK MARKET PRICES			10					Previous AIN=LMS11.	
LMS1437	4.2.000	DAMAGE ACCOUNT DETAIL BY LEASE			10					Previous AIN=LMS04.	
LMS1432	4.5.000	FAWP (FUNDS FOR AGRICULTURE AND WILDLIFE PROJECTS) APPLICATIONS		FE	3						



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LMS1433	4.5.000	SUMMARY OF FAWP (FUNDS FOR AGRICULTURE AND WILDLIFE PROJECTS) APPLICATIONS			20						
LMS1434	4.5.000	GRAZING LEASE - ANIMAL UNIT REPORTS			30						
LMS1438	4.6.002	DAMAGE ACCOUNT RECONCILIATIONS		FE	3					Previous AIN=LMS05	
LMS1440	4.7.000	EASEMENTS ON U. T. LANDS		PM						Previous AIN=LMS07.	
LMS1436	5.1.000	ABANDONED LINE RECORDS		AV						Record is maintained until line has been removed. Environmental Compliance. Previous AIN=LMS01.	
LMS1441	5.1.000	GRAZING EASEMENTS ON U. T. LANDS		PM						Maintained for historical purposes. Previous AIN=LMS08.	
LMS1444	5.1.000	MAPS OF UNIVERSITY LANDS		LA						Necessary for historical value. Previous AIN=LMS12.	Education Code 66.77.
LMS1445	5.1.000	MATERIAL SOURCE PERMITS	Issued to companies that purchase caliche on U. T. Lands.		1					Previous AIN=LMS13.	
LMS1447	5.1.001	SURFACE LEASES		PM							



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LMS1446	5.2.000	RATE AND DATE SCHEDULES			50					Used to help determine new fee structures on U.T. Lands. Based on information in expired leases. Previous AIN=LMS14.	
LMS1448	5.2.000	WATER BOOKS/MANAGEMENT RECORDS		PM						Maintained permanently for environmental and historical purposes. Previous AIN=LMS16.	
LMV1455	1.1.019	PUBLIC RELATIONS RECORDS		PM					O	Previous AIN=LMV04.	
LMV1456	1.1.000	RESEARCH RECORDS OF EXPERIMENTAL VINEYARD AND WINERY		AC	10			AC=After research is completed.		Previous AIN=LMV05.	
LMV1457	1.1.000	WINERY RECORDS - EXPERIMENTAL WINERY		US						Maintained in accordance with the Bureau of Alcohol, Tobacco and Firearms. Previous AIN=LMV06.	
LMV1452	1.1.068	REPORTS ON PERFORMANCE MEASURES		AC	10			AC=September 1 of odd-numbered calendar years			
LMV1454	4.3.002	RECEIPTS JOURNALS OR REGISTERS		FE	3					Previous AIN=LMV03	



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LTM1670	1.1.000	GEOPHYSICAL SURVEY PERMITS/CONTRACTS		AC	7			AC=termination or expiration of permit/contract		Changed from LA+3 to AC+7 per regulation 2017	
LTM1668	4.1.003	CANCELLED CHECKS/STUBS/WARRANTS/DRAFTS		CE	4						
LTM1674	4.1.007	TRANSFERS OR BUDGET REVISIONS		FE	4						
LTM1667	4.7.004	CAPITAL ASSET RECORDS		LA	3						
LTM1669	5.1.001	LEASES .		AC	7			AC=termination or expiration of lease		Previous AIN=LTM11, extended from AC+4 to AC+7 2017	
LTM1672	5.1.000	TECHNICAL WELL FILES		LA	3						
LTM1673	5.1.000	UNIT/OPERATING AGREEMENTS		LA	3					Previous AIN=LTM30.	
GPS1574	4.7.004	Gift Planning Services Active Records	Includes active files for Endowments, Estates, Charitable Trusts, Held-in Trust by Others, Contingent/Revocable Gifts and Current Purpose Gifts.	PM						Added Dec 2017 per approved amendment	



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ALL1852	5.3.007	Bid Documentation	Includes all bid requisition/authorizations, invitations to bid or propose, bid specifications successful and unsuccessful bids and bid tabulation/evaluations prior to August 31, 2015 and after September 1, 2015.	AC	7			AC= Date of Expiration or termination of the instrument according to its terms or decision not to proceed with the bid.		Added Dec 2017 per approved amendment	
ALL1853	5.3.007	Bid Documentation - Unsuccessful	Unsuccessful bids that do not meet agency submission requirements are not included in bid evaluation process (e.g. withdrawn, missed submission deadline, incomplete submission, etc.).	AC	2			AC= Date of notification of denial or date of withdrawal, as applicable.		Added Dec 2017 per approved amendment	
ALL1854	5.3.009	Requests for Information	Requests for information preliminary to the procurement of goods or services by direct purchase or bid.	AC				AC= Date of direct purchase, or decision not to proceed with the procurement, as applicable.		Added Dec 2017 per approved amendment - CAUTION: If the request for information leads to request for proposal or bid, see item number 5.3.007.	



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ALL1954	3.3.023	Payee Information Forms	Includes reimbursable activities, requests and authorizations to engage in, requests for Taxpayer Identification number (TIN) and Certification (W-9 Forms).	FE	3					Added Dec 2017 per approved amendment	
OEB2161	2.2.010	Employee Benefits Security Policies, Procedures and Program Documentation		US	6					Added Dec 2017 per approved amendment	
OEB2077	3.3.004	Employee Benefits Plan Information		US	1					Added Dec 2017 per approved amendment	29 CFR 1627.3(b)(2)
OEB2078	4.2.003	Benefits Billing Payment Logs		FE	3					Added Dec 2017 per approved amendment	
OEB2079	4.4.002	Accounts Receivable Ledgers	Ledgers related to employee benefits.	FE	3					Added Dec 2017 per approved amendment	
OEB2080	4.5.001	Worksheets for Preparing Fiscal Reports	Worksheets related to employee benefit operations.	FE	3					Added Dec 2017 per approved amendment	
OEB2081	5.1.001	Direct Payment Agreements and Terminated Direct Payment Agreements		AC	7			AC= Expiration or termination of the instrument		Added Dec 2017 per approved amendment	Government Code 441.1855



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OGC1864	1.1.048	Legal Files of Historical Significance		AC	10			AC= Date of execution of agreement, contract, lease or license; or close, completion of legal matter, project, opinion or study.	O	Added Dec 2017 per approved amendment - All significant documents, including contracts, grants, applications, licenses, permits and other agreements that are of lasting significance, due to potential claims, need for reference, or other potential future use. These would include environmental permits, superfund actions, environmental studies, FCC licenses, and other documentation that has a useful life well in excess of three years.	