

October 4, 2023



Angela Ossar
Records Management Officer
The University of Texas System
210 West 7th Street
Austin, TX, 78701

Dear Angela Ossar,

Amendment 3 of the 8th recertification of your agency's records retention schedule is approved for use as of **10/2/2023** and may be accessed on our website at <https://www.tsl.texas.gov/slrn/state/schedules>. Please maintain this amendment with your currently approved schedule so that it can be easily referenced.

We appreciate your efforts in maintaining an up-to-date schedule. Making additions and changes to your schedule as you identify them not only ensures the integrity of your recordkeeping practices, but keeps your agency in compliance with state 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:

Raul Gonzalez
512-463-6623
rgonzalez@tsl.texas.gov

Sincerely,

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

Craig Kelso
Director and State Records Administrator

cc: Agency head

Lorenzo de Zavala
State Archives and
Library Building

1201 Brazos Street
Austin, Texas
78701

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

www.tsl.texas.gov

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Director and Librarian
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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 The University of Texas System

(Check one)

- Initial Certification - Form SLR 105
- Recertification - Form SLR 105
- Amendment - Form SLR 122

I hereby certify that this records retention schedule was prepared in accordance with Texas Government Code, Chapter 441, Subchapter L.

(Check one)

- Agency Head
- Records Management Officer

Signature Angela Ossar
Name (Print or type) Angela Ossar
Date September 6, 2023

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 Gloria Meraz
Name (Print or type) Gloria Meraz
Date 10/2/23

Cert/Recert No. 8 Amendment No. 3

CAUTION

A state record with an expired retention period 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 with a retention period that 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.

Amendment Note: If this schedule is amended at any point after certification, updated records series will be indicated by an asterisk (*) preceding the Agency Item Number (AIN).

State and Local Records Management Division
Texas State Library and Archives Commission
(Rev. 7/20)





STATE OF TEXAS Records Retention Schedule

SLR 105
Rev. 2021-07

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
 E – Exempt from archival review and transfer

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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				
ALL1851	4.1.009	Account Reconciliations	Departmental copies of internal budgets, invoices, or reconciliations, including any related tracking systems.	FE	3						
ALL1801	1.1.013	Calendars, Appointments, and Itineraries	Calendars, appointment books, or other itinerary records that document business activities.	CE	1					CAUTION: Not for records of the Chancellor or Board of Regents; see CHA2143 and BOR2143. The disposition of Outlook calendars is tied to employee separation.	
ALL2142	1.1.007	Correspondence – Executive	Incoming/outgoing and internal leadership, supervisory, managerial, executive, administrative, substantive, and other high-level correspondence in any media, including email or other electronic communication, pertaining to the formulation, planning, implementation, interpretation, modification, or redefinition of the programs, services, or projects of an agency and the administrative regulations, policies, and procedures that govern them.	AC	4			AC=End of term or service in agency.	O		
ALL1798	1.1.008	Correspondence - Non-Executive	Emails, letters, memos, or other communications concerning System operations that are not included in another record series on this schedule.	AC	2			AC=Date sent or received.			



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ALL2200	5.2.029	Correspondence - Returned Mail	Documentation of mail returned by the postal or other mail delivery services as undeliverable.	AC	1			AC=Date returned.			
ALL2201	2.1.002	Databases - Master Files and Application Data	Relatively long-lived computer files containing organized and consistent sets of complete and accurate electronic records and associated processing files. Examples include, but are not limited to, data tables of relational databases used by applications or computer programs.	AC	0			AC=Until electronic records are transferred to and made usable in a new system environment, or there are no electronic records being retained to meet an approved retention period established in this schedule that require the use of the system.			
*ALL2216	3.1.000	Departmental Personnel Files	Information about an employee that is maintained at the department level, usually by a supervisor or HR Liaison. May include but is not limited to checklists, notes, or working documents related to any personnel matter.	AC		6		AC=Date of separation or transfer to another department.		CAUTION: Checklists should be retained by the department until six months after separation from the department. All other records in the file must be transferred to the Office of Talent and Innovation immediately upon separation from the department.	
*ALL2203	3.4.007	Departmental Time and Leave Records	Leave requests and authorizations, overtime or compensatory time authorizations, and any other record of time or leave not captured in official timekeeping systems.	FE	3						Texas Government Code, Section 661.152(d); 29 CFR 825.500(b)



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ALL2202	5.1.004	Directories - Mail and Telecommunications Listings	Any lists or directories of mailing addresses, telephone or fax numbers, or email addresses maintained by an agency on its employees or on entities or persons it serves.	AC	0			AC=Date superseded or discontinued.			
ALL1942	5.2.010	Equipment Manuals		LA	0						
ALL2214	11.1.006	Event Planning Records	Records relating to the planning and administration of a conference, forum, or other event. Records may include reservation information, catering services orders, participant evaluations, summary reports, and related correspondence.	AC	3			AC=Completion of the event.			
ALL1849	4.5.002	Fiscal Management Reports and Worksheets	Internal and external periodic fiscal management reports and associated worksheets, including federal financial reports, salary reports, HUB reports, investment performance reports, etc.	FE	5						
ALL2215	1.1.000	Meeting Agendas and Minutes – Governance/Advisory Committees	Agendas, minutes, and supporting documentation of meetings of governance or advisory boards, councils, and committees.	AC	5			AC=Approval of minutes or, if no minutes are prepared, date of the meeting.		CAUTION: Does not include records of Board of Regents committees; see BOR1247 and BOR2117.	



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ALL1827	1.1.023	Organization Charts	Charts or diagrams that show the structure of an agency and the relationships and relative ranks of its departments and job positions.	AC	0			AC=Date superseded or discontinued.	I	ARCHIVES NOTE: Only charts showing the overall arrangement and administrative structure of the agency require archival transfer. Organizational charts showing only department level detail are not considered archival and may be destroyed when they meet retention.	
ALL1828	1.1.024	Plans and Planning Records	Plans and records relating to the process of planning new or redefined programs, services, or projects of an agency that are neither included in nor directly related to other records series in this schedule.	AC	3			AC=Decision made to implement or not to implement result of planning process.	O	CAUTION: Some of these records may be confidential.	
ALL1800	3.3.025	Policies, Procedures, and Directives (Internal)	Any internally distributed manuals, guidelines, or similar records that define internal policies, job procedures, or general office procedures.	AC	3			AC=Date superseded or discontinued.			



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ALL1829	1.1.070	Policies, Procedures, and Rules - System Programs and Services	Manuals, guidelines, administrative rules, or similar records distributed internally for the use of employees or externally to the public or those individuals or entities regulated by an agency that sets out the rules, policies, and procedures that govern an agency's programs, services, or projects. Includes working files and related documentation used in creating rules, policies, and procedures.	AC	3			AC=End of need for rule, policy, or procedure.	O	Chiefly for external policies. For internal policies, see ALL1800. ARCHIVES NOTE: Working files and related documentation used in creating the final rules, policies, and procedures, are not subject to archival review and may be destroyed at the expiration of the retention period.	
ALL2205	1.1.019	Public Relations Records	News, press releases, marketing files and collateral, or any public relations files maintained or issued by an agency. Includes print, electronic, audio, and audiovisual records.	AC	2			AC=Date created.	O		



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ALL2206	1.3.001	Publications – Major (Archival)	A publication is defined as information in any format that is publicly distributed by the agency, statutorily required to be distributed by the agency, or produced by the authority of or at the expense of the agency. The term generally does not include information distributed solely to internal staff, staff of other government agencies, or contractors/grantees of the agency. “Major” is defined by both the publication's authorship and its impact on Texas and Texans. Some examples of major publications include handbooks, guides, manuals, external newsletters, research reports or studies, and statistical compilations.	AC	2			AC=Publication is superseded or discontinued.	I	ARCHIVES NOTE: Copies of major publications must be submitted to the Texas State Publications Depository Program, TSLAC, by law. Design files, images, original artwork, or drafts created in the creation of a major publication are also considered archival.	Texas Government Code, Sec. 441.101-.106 and 13 TAC 3.1-.16



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					Years	Months	Days				
ALL2207	1.3.001	Publications – Minor (Non-Archival)	Information in any format that is publicly distributed by the agency, statutorily required to be distributed by the agency, or produced by the authority of or at the expense of the agency. The term generally does not include information distributed solely to internal staff, staff of other government agencies, or contractors/grantees of the agency. Some examples of minor publications include brochures, announcements, artwork, and internal newsletters.	AC	2			AC=Publication is superseded or discontinued.		NOTE: Development files of minor publications (drafts, design files, images, etc.) are transitory information and may be destroyed when no longer needed for reference.	
ALL2208	1.2.013	Records Access and Tracking Systems	Documentation used to provide and improve access to records. Includes indexes, card files, shelf lists, registers, guides, and other finding aids.	AC	0			AC=When tracking system is superseded, or no longer needed because associated records have been destroyed.		CAUTION: These records must carry the same retention period and archival codes of the records they support.	
ALL1940	1.2.014	Records Management Plans	Departmental records management plans (DRMPs), file plans, and similar records that establish the procedures under which records are managed in a department.	AC	1			AC=Date superseded or discontinued.			
ALL2209	3.3.023	Reimbursable Activity Records	Requests and authorizations for travel; participation in educational programs, workshops, or college classes; or for other work-related activities for which the expenses of the employee are defrayed or reimbursed.	FE	3						



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ALL1943	1.1.069	Reports - Activity	Reports compiled by agency personnel on a daily or other periodic basis pertaining to workload monitoring, task completion times, number of public contacts, and similar activities.	FE	1						
ALL1840	1.1.067	Reports and Studies (Non-Fiscal)	Annual, sub-annual, or special reports or studies on non-fiscal aspects of an agency's programs, services, or projects compiled by agency personnel, by advisory committees, or by consultants under contract with an agency that are not noted elsewhere in this schedule. Includes reports distributed either internally or to other entities.	AC	10			AC=Date of report.	O		
ALL2210	1.1.065	Reports and Studies (Non-Fiscal) -- Raw Data	Information or data collected and compiled for the purpose of producing non-fiscal reports.	AV	0						
ALL2212	4.7.012	Signature Authorizations	Records establishing authority of an agency employee to authorize financial, legal, or operational transactions on behalf of an agency. Includes Delegated Signature Authority (DSA) memos or other records serving this purpose, including emails.	AC	4			AC=Until superseded, date of expiration, or termination of employment, whichever sooner.			



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ALL1831	1.1.040	Speeches, Papers, and Presentations	Notes or text of speeches, papers, presentations, or reports delivered in conjunction with agency work.	AC	2			AC=End of event, until superseded, or obsolete.	O	ARCHIVES NOTE: Only speeches, papers, and presentations given by or on behalf of executive staff, board or commission members, division directors and program heads require archival review.	
ALL1837	1.1.063	Staff Meeting Minutes and Notes	Minutes or notes, and supporting documentation, taken at internal agency staff meetings.	FE	1					NOTE: Intended for meeting summaries, substantive notes or reports and supporting documentation from internal meetings. Individual reminder or reference notes made by individuals are generally considered Transitory Information; see item number ALL1835.	
ALL1843	3.3.030	Training Development and Presentation Records –Internal	Records documenting the planning, development, implementation, administration, and evaluation of in-house training programs, including but not limited to training manuals, course registration, class rosters, sign-in sheets, syllabi, course outlines, and similar training aids used in in-house training programs.	AC	2			AC=Close of training session, after training materials superseded, or termination of training program, as applicable.		CAUTION: Does not include police academy training records; see applicable POL series. Does not include hazardous materials training records; see RC1642.	



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ALL2213	1.1.043	Training Materials and Administrative Records – External	Instructional materials and other records developed by an agency associated with training the entities or non-personnel individuals it regulates or serves, including but not limited to training manuals, course registration, class rosters, sign-in sheets, syllabuses, course outlines, and similar training aids used in external training programs.	AC	1			AC=Close of training session, after training materials superseded, or termination of training program, as applicable.		CAUTION: Does not include police academy training; see applicable POL series. See ALL1843 for internal personnel training materials and EHS1642 for hazardous material training records.	
ALL1835	1.1.057	Transitory Information	Records of temporary usefulness that are not an integral part of a records series of an agency and are not essential to the fulfillment of statutory obligations or to the documentation of agency functions. Some examples of transitory information, which can be in any medium (voice mail, fax, email, hard copy, etc.) are routine messages; telephone message notifications; internal meeting notices; routing slips; incoming letters or memoranda of transmittal that add nothing of substance to enclosures; and similar routine information used for communication, but not for the documentation, of a specific agency transaction.	AC	0			AC=Purpose of record has been fulfilled.			
ACA12	1.1.000	Chronological Administrative Records		AC	20			AC=End of term.			



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*ACA1178	1.1.000	Degree Programs - Working Files	Letters or forms required by the Texas Higher Education Coordinating Board.	AC	5			AC=After approval by department head.		NOTE: OAA retains for reference only; more complete records are held by UT institutions, who are responsible for archival transfer.	
ACA1756	1.1.000	Appointments by Governor		FE	1				O		
ACA1956	3.1.014	Presidential Search Committee Records	May include notes of interviews with candidates; questions asked of applicants; audio and videotapes of job interviews; driving record and previous injury checks; and all other records that document the selection process, except for those noted in Remarks.	AC	2			AC=Date of the making of the record or the personnel action involved, whichever occurs later.		CAUTION: Does not include criminal history checks; see POL1766.	29 CFR 1602.49(a)
ACA2006	3.3.020	Work Schedules or Assignments		FE	1						
AUD1957	5.4.018	Annual Audit Plan	Includes working papers and agency risk assessment used to develop the plan.	AC	7			AC=After final plan has been issued.			Texas Government Code, Sec. 2102.013
AUD1958	3.1.019	Performance Appraisals	Job evaluations, performance appraisals, or other similar documents used to evaluate the performance of an employee.	FE	2						29 CFR 1620.32(c)
AUD1960	1.1.002	Audits	Audits and reviews performed by or on behalf of the agency, including the working papers that support the audit.	AC	7			AC=Publication or release of final audit findings.			



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AUD1962	5.4.019	Quality Assessment Reviews – Other Programs	Working papers and final reports of Quality Assessment reviews of outside entities, performed by System Audit Office staff.	AC	5			AC=After final report has been issued.		NOTE: Applies only to reviews led by a System Audit employee. If the System Audit employee is only participating in the review, workpapers may be considered transitory information.	
AUD1964	5.4.019	Quality Assessment Reports – System Audit Office	Reviews of the System Audit Office, performed by external/independent firms.	AC	10			AC=Until superseded, but see note.		NOTE: Retain the previous three reports until a new report is issued.	Texas Government Code, Sec. 2102.007(a)(5)
BOR1247	1.1.062	Meetings - Supporting Documentation	Documents submitted at meetings of state boards, commissions, committees, and councils, including exhibit items, documentation for agenda items, public comment forms, etc. Includes documents sent in advance of meetings for briefing purposes, some of which may not be submitted at an actual meeting.	PM					I		
BOR1866	1.1.070	Rules, Policies, and Procedures - Final	Manuals, guidelines, administrative rules, or similar records distributed internally for the use of employees or externally to the public or those individuals or entities regulated by an agency that sets out the rules, policies, and procedures that govern an agency's programs, services, or projects. Includes working files and related documentation used in creating rules, policies, and procedures.	PM					I		



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BOR1963	1.1.066	Reports - Biennial or Annual Agency (Narrative)	Biennial narrative reports to the governor and legislature as required by an agency's enabling statutes, including annual narrative reports if they are required by statute. Includes working files and related documentation used in creating final report, but see Archives Note.	AC	6			AC=September 1 of odd-numbered calendar years.	I	ARCHIVES NOTE: The archival requirement is met by sending the final version of these reports to the Texas State Publications Depository Program, Texas State Library and Archives Commission, per 13 TAC 3.3. Working files and related documentation used in creating the final report may be disposed of at the expiration of the retention period.	
BOR1965	3.1.013	Employment Contracts	Contracts or agreements regarding the terms and conditions of the employment of Chief Administrative Officers.	AC	7			AC=Termination of employment of Chief Administrative Officer.			Texas Government Code, Sec. 441.1855
BOR1966	3.1.027	Training and Educational Achievement Records (Individual)	Certificates of completion, certifications, licenses, transcripts, test scores, or similar records documenting the training, testing, certification, licensing, or continuing education achievements of an employee.	AC	5			AC=Termination of employment.			
BOR1967	3.1.034	Resumes-Unsolicited	Retention period only applies if the agency replies to the sender of a resume that it will be kept on file should future job openings occur.	AV	0					See HR1000 for resumes, whether solicited or unsolicited, that are used in any way in the employment selection process.	



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BOR1974	5.1.005	Postage Records	Records and reports of postage expenses, including postal meter usage.	FE	3						
BOR1975	3.1.014	Chancellor and Presidential Search Committee Records	Includes notes of interviews with candidates; questions asked of applicants; audio and videotapes of job interviews; driving record and previous injury checks; pre-employment physical examinations; polygraph examination results; and all other records that document the selection process, except for those noted in Remarks	AC	2			AC=Date of the making of the record or the personnel action involved, whichever occurs later.		CAUTION: Does not include criminal history checks; see POL1766.	29 CFR 1602.49(a)
BOR1976	1.1.059	Meetings, Certified Agendas or Audiovisual Recordings of Closed	Agendas, minutes, or audiovisual recordings of closed meetings of state boards, commissions, committees, and councils.	AC	2			AC=The date of the meeting or completion of pending action involving the meeting, whichever is later.			Texas Government Code, Sec. 551.104(a)
BOR1978	1.1.007	Correspondence - Executive (Regental)	Correspondence, sent or received by the Board of Regents or any of its members, that pertains to the formulation, planning, implementation, interpretation, modification, or redefinition of the programs, services, or projects of the University of Texas System or its institutions.	PM							
BOR1979	1.1.060	Meetings, Audiovisual Recordings of Open	Audiovisual recordings of open meetings of state boards, commissions, committees, and councils.	AC	0	3		AC=Official approval of written minutes of the meeting by the Board of Regents.		CAUTION: These recordings must be retained at least 90 days.	



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BOR2117	1.1.058	Meeting Agenda and Minutes	Agendas and minutes of meetings of the Board of Regents.	PM					I	ARCHIVES NOTE: Agency retains permanent record copy. The archival requirement will be met by sending a copy to the Briscoe Center for American History at UT Austin.	
BOR2143	1.1.013	Calendars, Appointments, and Itineraries - Regental	Calendars, appointment books, or other scheduling or itinerary records maintained by or on behalf of the Board of Regents or any of its members.	AC	1			AC=End of term of service.	O		
BUD1000	4.9.001	Annual Operating Budgets	Required by the General Appropriations Act.	PM						Budget Office is the source of historical information for system and institutional inquiries.	
BUD1001	1.1.004	Legislative Appropriation Requests	Includes Legislative Appropriation Request (LAR) and any supporting documentation created and/or used to justify and support the request.	PM					I	Budget Office is the source of information for system and institutional inquiries. ARCHIVES NOTE: The final version of Legislative Appropriation Requests must be submitted to the Texas State Publications Depository Program per 13 TAC 3.3(a)(3)(A).	
BUD1002	4.5.002	Fiscal Notes	Fiscal notes and working papers.	AC	6			AC=September 1 of odd-numbered calendar years.			



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BUD1003	4.9.001	Budgeting Documentation	Includes documentation about budget transfers and revisions, as well as detail charts of accounts. Also includes work papers used to prepare budgets.	FE	10					CAUTION: Does not include Annual Operating Budgets; see BUD1000. Does not include copies of budgeting information maintained by departments; see ALL1851.	
BUD1004	1.1.068	Reports on Performance Measures and Supporting Documentation	Quarterly and annual reports on agency performance measures submitted to executive and legislative offices. Includes supporting documentation.	AC	6			AC=September 1 of odd-numbered calendar years.			
OFPC1000	1.1.067	Capital Improvement Project (CIP) Reports	Annual and quarterly reports of all major new construction and repair and rehabilitation projects to be implemented and funded from institution and System-wide revenue sources.	PM						NOTE: Major projects are defined in the Regents' Rules and Regulations as those with a total project cost of \$10,000,000 or more. Projects that are architecturally or historically significant are also identified as major projects regardless of cost.	



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OFPC1322	5.2.002	Building Construction Project Files	Project records related to planning, design, construction, conversion, or modernization of state facilities, structures, infrastructure, and systems, including feasibility, screening, and implementation studies; topographical and soil surveys and reports; as-builts; laboratory test reports; environmental impact statements; correspondence; successful and unsuccessful bid documentation and other related documentation.	AC	11			AC=Completion of project.	O		
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.			
*OFPC1325	5.2.003a	Building Plans and Specifications	Includes architectural and engineering drawings, profiles, and blueprints of planning, design, construction, conversion, or modernization of state-owned facilities, structures, infrastructure, and systems.	LA					O		
OFPC1948	5.2.028	Building Contracts	Building construction contracts, surety bonds, and inspection records.	LA	10				O		



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FAC1721	5.2.019	Service Orders	Requests or work orders for repairs or maintenance to facilities, vehicles, or equipment completed by internal agency personnel or external service providers.	AC	5			AC=Service request completed.			
FAC1722	5.4.012	Security Access Records	Records relating to the issuance of keys, identification cards, building passes, passwords, signed statements or similar instruments of access to agency or state facilities, equipment or automated systems.	AC	2			AC=Until superseded, returned, date of expiration, or date of termination, whichever sooner.			
FAC1800	5.1.005	Postage Records	Records and reports of postage expenses, including postal meter usage.	FE	3						
*FAC1801	5.2.012	Quotes (Supply and Repair Cost Estimates)	Quotes for minor construction and repair projects and supplies. Includes supporting documentation, as applicable.	AC	1			AC=Date received.			
CHA1269	3.1.000	Financial Disclosure and Conflict of Interest Affidavits	For the Chancellor and Presidents.	FE	3						
CHA2143	1.1.013	Calendars, Appointments, and Itineraries -- Chancellor	Calendars, appointment books, or other scheduling or itinerary records maintained by or on behalf of the Chancellor.	AC	1			AC=End of term of service.	O		
CHA2144	3.1.019	Executive Officer Performance - Workplans and Appraisals	Job evaluations, performance appraisals, or other similar documents used to evaluate the performance of an employee.	FE	3						29 CFR 1620.32(c)



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CON1000	4.1.001	Accounts Payable Information	Invoices; vouchers (encumbrance, purchase, expenditure, or special vouchers); statements; copies of checks and purchase orders; expenditure authorizations; ledgers; and similar records that serve to document disbursements. Includes ProCard statements and backup documentation.	FE	3						
CON1001	4.1.009	Accounts Receivable Information	Bill copies or stubs, statements, billing registers, account cards, deposit warrants, cash receipts, credit card receipts, receipts books, cash transfers, daily cash reports, reconciliations, special vouchers, and similar records that serve to document money owed to or received by a state agency and its collection or receipt.	FE	3						
CON1002	4.8.001	Banking Records	Bank statements, credit card statements, cancelled checks, check registers, deposit slips, debit and credit notices, reconciliations, and other banking related records.	FE	3						



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CON1003	4.5.010	Unclaimed Property Reports and Documentation	Sufficient records to verify information on unclaimed property showing the name and last known address of the apparent owner of reportable unclaimed property, a brief description of the property, and the balance of each unclaimed account, if appropriate. Includes both escheatment and documentation of unclaimed property claims made by System.	AC	10			AC=Date on which property is reportable or date the report is filed, whichever is later.			Texas Property Code, Sec. 74.103(b)
CON1004	4.7.003	Uncollectible Accounts	Records of accounts deemed uncollectible, including write-off authorizations and returned checks, warrants, and drafts.	AC	3			AC=Date account deemed uncollectible.			
CON1005	5.3.010	Payee Information Forms	Includes requests for Taxpayer Identification number (TIN) and Certification (W-9 Forms).	FE	3					FE=The fiscal year in which the account is opened or the instrument is purchased.	26 CFR 31.3406(h)-3(g)
CON1289	4.1.006	Investment Transaction Files	Records documenting the investment of any public funds that evidence the investment of such funds, the cancellation or withdrawal of investments, and similar activities.	FE	5						



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CON9999	4.7.008	IPSI Grant Records	Grant authorization records, which provide evidence of the award of grants to or by agencies; grant/project financial or performance reports, which are periodic reports of financial activity and/or program performance related to grants received or made by agencies.	AC	3			AC=Satisfaction of all Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments (the Common Rule).		Record series to be deleted after disposition of files in FileNet coded IPSI1930.	
CNP1001	5.3.007	Bid Documentation – Successful and Unsuccessful	Includes all bid requisitions/authorizations, Requests for Proposals (RFP), Requests for Qualifications (RFQ), invitations to bid or propose, bid specifications, all bids regardless of whether awarded, and bid tabulation/evaluations (scoresheets).	AC	7			AC=Date of expiration or termination of the instrument according to its terms or decision not to proceed with the bid.		NOTE: The Executive Vice Chancellor for Business Affairs (EVCBA) is the owner of contracting record per Regents' Rule 10501, but delegates the maintenance of centralized contracting files to the Office of the Controller (Contracts and Procurement). To ensure compliance with RR 10501, departments must provide all non-transitory contracting records to Contracts and Procurement for inclusion in the central contract administration system.	Texas Government Code, Sec. 441.1855
CNP1002	5.3.007c	Bid Documentation – Invalid or Withdrawn	Bids that do not meet agency submission requirements and are not included in the 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.			



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CNP1003	5.1.001	Contract Administration Files	Contracts, leases, and agreements include general obligation, land lease, utilities, construction except for buildings (see OFPC1948), and certain employment contracts (see also BOR1965). Documents include specifications, affidavits of publication of calls for bids, performance bonds, contracts, purchase orders, inspection reports, and correspondence. May also include other applicable documentation in the master contract file per Texas Comptroller of Public Accounts Contract Management Guide.	AC	7			AC=Expiration or termination of the instrument according to its terms.		NOTE: To ensure compliance with RR 10501, departments must provide all non-transitory contracting records to Contracts and Procurement for inclusion in the central contract administration system. See Remarks of CNP1001.	Texas Government Code, Sec. 441.1855
CNP1004	5.3.009	Requests for Information	Requests for information preliminary to the procurement of goods or services by direct purchase or bid.	AC	0			AC=Date of direct purchase, or decision not to proceed with the procurement, as applicable.		CAUTION: If the request for information leads to request for proposal or bid, see item CNP1001.	
CNP2000	5.1.017	Contract Summaries and Reports	Contract Summaries, Purchase Order Summaries, Past Request for Proposal Postings, and the Contract Transparency Report.	FE	3						



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CON2000	5.2.006	Inventory and Property Control Records	Records documenting the inventorying, maintenance, usage, and disposal of supplies, equipment, and property of a state agency. Includes property logs and cards for lost and found property. May also include lost, stolen, or damaged property reports.	FE	3					NOTE: The Controller maintains the official record of inventory, but department inventory contacts are responsible for maintaining copies of inventory information provided by individual staff (e.g., emails or pictures) for their respective departments.	
CON2001	4.7.004	Capital Asset Records	Documentation relating to the capital and fixed assets of a state agency, including equipment or property history cards containing data on initial cost, depreciation schedules or summaries used for capital outlay budgeting, and property sale, auction, or disposal records of agency owned equipment and property.	LA	3						
CON3000	3.2.002	Payroll Records	Payroll records and registers documenting employee earnings, wages, and pay. This may include but is not limited to W-4 Forms, W-5 Forms, Income Adjustment Authorizations, Direct Deposit Applications and Authorizations, Employee Deduction Authorizations, payroll input records, summary statements, payroll vouchers, payroll detail sheets, and payroll history.	FE	4					NOTE: Some older payroll records may be retained by Human Resources in the employee file. Such payroll records are retained until superseded or separation or termination of employment + 5 years.	40 TAC 815.106(i)



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CON1274	4.5.002	Worksheets for Preparing Fiscal Reports		FE	9						
CON1278	4.5.003	Annual Financial Reports	Annual Financial Report (AFR) required by the General Appropriations Act (100 Day Report).	PM						ARCHIVES NOTE: The final version of the report must be submitted to the Texas State Publications Depository Program per 13 TAC 3.3(a)(2)(a).	
CON1279	4.5.003	Annual Financial Report - Working Files	Working files and related documentation used to prepare the AFR.	FE	7						
CON4000	3.2.003	Federal Tax Records	Includes 1099, W2, FICA, excise tax, and other 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)
CON1273	3.2.003	Unrelated Business Income Tax (UBIT) Records	Form 990-T and related tax records. Also includes OK512E and related documentation.	AC	23			AC=Tax due date, date claim is filed, or date tax is paid, whichever is later.		See IRS Publication 598.	
*TRA1738	5.6.002	Aircraft Passenger Lists	List of passengers on an aircraft. Includes passenger manifest (snapshot of flight).	FE	3					Copies are sent to TxDOT Flight Services annually.	Texas Government Code, Sec. 2205.039
*TRA1739	5.6.001a	Aircraft Flight Logs	Logs and related documentation used to maintain information about state-owned aircraft flight data. Includes pilot manifest signed by passengers.	LA	3					Copies are sent to TxDOT Flight Services annually.	Texas Government Code, Sec. 2205.039
OEB1304	2.2.011	Employee Benefits Data Entry Logs		AC	0			AC=When reconciliation confirmed.			
OEB1307	1.1.000	Contracted Carrier Correspondence and Reports		FE	7						



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OEB1309	4.5.002	Financial Statements		FE	5						
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.			
OEB1316	3.3.000	Insurance Contracts	Medical, Vision, Dental, Long-Term Care, Long and Short-Term Disability, Flexible Spending Account, Wellness	AC	15			AC=End of contract.			
OEB1492	3.3.004	Retirement Plan Documents		US	10					Audit requirements require 10-year retention period.	29 CFR 1627.3(b)(2)
OEB2077	3.3.004	Employee Benefits Plan Information		US	1						29 CFR 1627.3(b)(2)
OEB2078	4.1.001	Benefits Billing Payment Logs		FE	3						
OEB2079	4.1.009	Accounts Receivable Ledgers	Ledgers related to employee benefits.	FE	3						
OEB2080	4.5.002	Worksheets for Preparing Fiscal Reports	Worksheets related to employee benefit operations.	FE	5						
OEB2081	3.2.008	Direct Deposit Applications or Authorizations	Direct payment agreements for COBRA and retirees.	US							
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	0			AC=Until superseded or obsolete.			



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OEB2152	3.1.000	Employee Benefits Mandated Benefits Coordination and Secondary Payee Claims		AC	3			AC=Resolution of claim.			
OEB2153	3.1.000	Retirement Loan and Deferred Compensation Plan Information		AC	10			AC=After loan has been paid.			
OEB2154	3.1.000	Employee Benefits Medicare Records		AC	6			AC=Resolution of claim.			
OEB2155	4.8.001	Employee Benefits ProCard and Expenditure Vouchers		FE	7						
OEB2156	4.7.005	Employee Benefits Special Claims	May include incapacitated dependent applications, dependent amnesty, special dependent applications, and ZIP Code applications.	AC	5			AC=Resolution of claim.			
*OEB2157	4.7.005	Employee Benefits Insurance - Electronic Medical Claims	Electronic claims data kept on the mainframe.	AC	7			AC=Resolution of claim.			
OEB2158	5.1.001	Life Insurance Contracts and Retirement Contracts		AC	30			AC=Expiration or termination of the instrument according to its terms.		For Employee Benefits Insurance Contracts, see item CNP1003 (Contract Administration Files).	
OEB2160	1.1.002	Audits		AC	7			AC=Publication or release of final audit findings.			



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OEB2161	2.2.010	Employee Benefits Security Policies, Procedures and Program Documentation		US	6						
OEB3000	3.1.011	UTGRA Records	Personnel records of participants of the University of Texas Government Retirement Agreement (UTGRA) program.	AC	10			AC=End of payout.		In accordance with Article 1, Paragraph 1.9 (b) of the UTGRA Plan Document, OEB maintains UTGRA records on behalf of the Board of Regents (BOR). The BOR therefore is the owner of the records but delegates OEB to take any ministerial actions necessary on behalf of UT System for the administration of the UTGRA plan.	29 CFR 1627.3(b)(2)
GPS1574	13.2.005	Gift Records – Active	Includes active files for Endowments, Estates, Charitable Trusts, Held-in Trust by Others, Contingent or Revocable Gifts, and Current Purpose Gifts.	PM					I	Archival code added per 13 TAC Sec. 6.10(b), but records will remain at UT System in perpetuity.	
GPS1575	13.2.003	Estates or Assets Held in Trust by Others		AC	10			AC=Close of estate or trust.	I		
GPS1576	13.2.003	Endowments - Term		AC	7			AC=Endowment funds have been completely transferred.	I		
GPS1577	13.2.005	Endowments - Perpetual		PM					I	Archival code added per 13 TAC Sec. 6.10(b), but records will remain at UT System in perpetuity.	



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GPS1578	13.2.003	Charitable Trusts/ Pooled Income Fund/ Remainder Interests in Life Estates		AC	7			AC=Close of estate or trust.	I		
GPS1583	13.2.000	Proposed, Contingent and Revocable Files		AC	3			AC=After determination of gift status.			
GPS1753	4.1.003	Federal Tax Records	IRS Forms 5227, 1041, 1065, and similar tax records related to the Charitable Remainder Trust. Comprises copies of records received from The University of Texas/Texas A&M Investment Management Company (UTIMCO).	AC	4			AC=Tax due date, date claim is filed, or date tax is paid whichever is later.			
GPS1772	13.2.001	Donor Records	Includes individual donor and prospective donor files.	AC	7			AC=Prospect ceases to be viable.	I	NOTE: The name or other identifying information about a donor may be withheld from public disclosure under the Public Information Act (Government Code Sec. 552.1235).	
GPS1777	13.2.005	Namings	Records related to philanthropic namings. May include, but is not limited to, gift agreements, confidential donor correspondence, and UT System approval letters.	PM					I	Archival code added per 13 TAC Sec. 6.10(b), but records will remain at UT System in perpetuity.	
GPS2004	4.8.001	Banking Records	Bank statements, deposit slips, gift envelopes, and related records.	FE	3						
GPS2106	13.2.003	Current Purpose Gifts		AC	7			AC=Close of estate or trust.	I		



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SPE1555	11.1.007	Official Occasion Records	Records pertaining to the administration of special events. May include records on planning and arrangements, reports, promotional and publicity materials, photographs, schedules of speakers and activities, registration and attendance lists, participant evaluations, and related documentation and correspondence.	AC	4			AC=Completion of the event.	O		
FIN1002	4.8.001	Banking Records	Bank statements listing account balances.	FE	3						
FIN2025	4.7.010	Long-Term Liability Records	Records documenting financial obligations of a state agency that are not payable within one year of the date of the balance sheet, including debentures, loans, deferred tax liabilities, bonds, and pension obligations.	AC	3			AC=Retirement of debt; Bonds have been paid in full and presented to UT System Administration.		UTS 181, Sec. 9: Records Retention	



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OGC1864	1.1.000	Legal Files – Long-Term Value	Closed legal files with ongoing administrative, legal, or historical value, as determined by the attorney responsible for the file. May include litigation files or non-litigation files such as environmental permits, superfund actions, environmental studies, or FCC licenses.	AV					O	CAUTION: This record series is only to be used for closed files that have met retention under another record series. For example, a Health Law case classified under this record series must first be retained for AC+20 in accordance with OGC1862. ARCHIVES NOTE: Historically significant litigation case files or legal opinions must be transferred to the UT System archives at the UT Briscoe Center for American History when retention is met.	
OGC1000	1.1.000	Legal Files – Business Law	Legal files pertaining to contracts and transactional work.	AC	7			AC=Expiration of contract.		Files with long-term value beyond the retention period specified in this record series should be reclassified under OGC1864 when retention is met.	



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OGC1862	1.1.048	Litigation Files – Health Law	Records created by or on behalf of the agency or its institutions in anticipation of or in the adjudication of a lawsuit.	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).		NOTE: Retention period reflects extended administrative value of Health Law cases, which may pertain to medical malpractice insurance matters. Files with long-term value beyond the retention period specified in this record series should be reclassified under OGC1864 when retention is met.	
OGC1472	1.1.048	Litigation Files – General	Records created by or on behalf of the agency or its institutions in anticipation of or in the adjudication of a lawsuit.	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).		Files with long-term value beyond the retention period specified in this record series should be reclassified under OGC1864 when retention is met.	
OGC1473	17.3.011	Patents Issued/Released		AC	6			AC=Life of patent (17-20 years, depending on when patent is issued).			35 USC Sec. 154
*OGC2115	4.7.005	Claims and Bankruptcy Files (Nonlitigation)		AC	5			AC=Resolution of claim.		Inactive record series. To be removed from schedule after all existing boxes have been dispositioned.	



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OGC2118	1.1.020	Public Information Requests - Not Excepted	Includes all correspondence and documentation relating to requests for records that are furnished to the public under the Public Information Act (Chapter 552, Texas Government Code). Also includes withdrawn requests.	AC	2			AC=After request has been satisfied or withdrawn.			
OGC2119	1.1.021	Public Information Requests - Excepted	Includes all correspondence and documentation relating to requests for records that are excepted under the Public Information Act (Chapter 552, Texas Government Code), including records provided to the legislature under section 552.008.	AC	2			AC=Date of notification that records are excepted.			
OGC2120	1.1.072	Public Information Reports	Reports made to the Office of Attorney General (OAG) on an agency's Public Information Act activities.	AC	2			AC=Date of submission to OAG.			Texas Government Code, Sec. 552.010
OGC2141	1.1.000	Professional Liability Enrollment, Changes, and Resignation		AC	20			AC=Date of enrollment.			
OGR1332	1.1.027	Proposed Legislation	Drafts of proposed legislation and related correspondence.	AC	1			AC=End of current legislative session (typically May 31).			
HEA1344	1.1.000	Meeting Agenda and Minutes - Council of Health Institutions		AC	10			AC=When agenda and minutes and finalized.		NOTE: Council disbanded 7/22/15; was not a governmental body as defined by Texas Government Code, Chapter 551.	



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HEA2116	3.1.014	Presidential Search Committee Records - Health Institutions	Applications, job descriptions, communications, CVs, contacts, search committee contacts, search guidelines, search committee rankings, and interview notes.	AC	2			AC=When applicant accepts or declines the position.		CAUTION: Does not include criminal history checks; see POL1766.	29 CFR 1602.49(a)
HEA2161	3.1.000	Personnel Files - Health Institution Presidents	Employment communications, assessments, compensation, and corrective or disciplinary actions.	AC	5			AC=Termination of employment.			
HUB1261	1.1.066	Reports - Biennial or Annual Agency (Narrative)	Biennial narrative reports to the governor and legislature as required by an agency's enabling statutes, including annual narrative reports if they are required by statute. Includes working files and related documentation used in creating final report.	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.	
ISO1000	2.2.001	System Monitoring Records	Records used to control and monitor a system, its data, and its security. May include vulnerability scans, intrusion tests, malicious code detection tests, threat and risk assessments, technical security reviews, patch management logs, intrusion detection logs, firewall logs, and related records. May also include records reporting on the levels and patterns of usage of system hardware, software application, or internet resources.	AV	0					The disposal of monitoring records that are automatically overwritten needs not be documented.	



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ISO1001	2.2.018	Biennial Information Security Plan	Biennial information security plan for protecting the security of the agency's information.	US	2						1 TAC 202.23; 1 TAC 202.73
POL1542	1.1.000	Post Academy Training Files		US	5					Texas Commission on Law Enforcement requires that ODOP maintain these records.	37 TAC Chapter 215
POL1765	1.1.000	User Identification Information Sheets		US	0						
POL1949	1.1.000	Training Materials - Academy Training		AC	5			AC=After graduation of cadet class.		Texas Commission on Law Enforcement recommends keeping indefinitely.	37 TAC Chapter 215
POL1950	1.1.000	Training Materials - Police Basic Training		AC	50			AC=End of training.		Retained as a record of instructor and subject matter for each academy class.	
POL1761	3.3.027	Aptitude and Skills Tests	Aptitude, competency, or skills tests and checklists required of job applicants or of current personnel to qualify for promotion or transfer, including validation records.	US	3						29 CFR 1602.49
POL1528	3.3.028	Aptitude and Skills Tests (Test Papers)	Completed aptitude, competency, or skills test papers and checklists of job applicants or of current personnel taking a test to qualify for promotion or transfer.	CE	3						29 CFR 1602.49
POL1766	3.1.026	Criminal History Checks	Criminal history record information on job applicants or agency employees obtained from the Department of Public Safety (DPS).	AC	0			AC=The criminal history record has served the immediate purpose for which it was obtained.			Texas Government Code, Chapter 411, Subchapter F
POL1537	3.1.000	Personnel Files - Commissioned Officers		AC	5			AC=Separation or termination of employment.			



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POL1771	3.1.000	Personnel Files - Office of Director of Police		AC	5			AC=Separation or termination of employment.		Forward to Personnel Office for Officers, Admin, and Guards at termination.	
POL1531	5.4.011	Visitor Control Registers	Logs, registers, or similar records documenting visitors to limited access or restricted areas of agency facilities.	FE	3						
POL1538	5.4.012	Security Access Records	Records relating to the issuance of keys, identification cards, building passes, passwords, signed statements or similar instruments of access to agency or state facilities, equipment or automated systems.	AC	2			AC=Until superseded, date of expiration, or date of termination, whichever sooner.		Electronic records are the official copy. Paper records provide vital records protection.	
POL1543	16.3.000	Police Investigations/Reports		AC	0			AC=Statute of limitations.		Maintained for legal reasons or until investigation matters are resolved.	
POL1768	16.3.039	Parking Citations	Includes related correspondence.	AC	3			AC=End of fiscal year of resolution.			
POL1770	5.2.006	Property Logs and Cards for Lost and Found Property		FE	3						
POL2000	5.1.018	Surveillance Video	Surveillance videos of buildings, facilities, vehicles, or other state property.	AV	0					See RWC1707 if video is needed for an accident investigation; see OGC1472 if the video is needed as evidence in litigation. The disposal of surveillance videos needs not be documented.	



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POL1529	5.6.005	Vehicle Use Reports	Includes mileage, fuel/oil consumption, passengers carried and other related operational information.	FE	3						
POL1951	1.1.063	Meeting Notes - Component Institution Police Chiefs		FE	10						
POL1952	1.1.067	Reports and Studies (Non-Fiscal)	Annual, sub-annual, or special reports or studies on non-fiscal aspects of an agency's programs, services, or projects compiled by agency personnel, by advisory committees, or by consultants under contract with an agency that are not noted elsewhere in this schedule. Includes reports distributed either internally or to other entities.	PM					O		
POL2003	1.1.067	Reports - Annual Inspections of Component Institutions		CE	10				O		
REA1212	1.1.000	Real Estate Closing Papers		PM							
REA2113	1.1.000	Component Properties and Trust Fund Properties - Working Papers		AC	7			AC=Termination or expiration of lease or contract.			Texas Government Code, Sec. 441.1855



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RIM1944	1.2.010	Records Disposition Requests and Logs	Records disposition request forms submitted by departments and master records disposition log of records destroyed or transferred to archives.	FE	10					FE=The end of fiscal year in which the records were disposed. Records Management Officer maintains master records of final disposition.	13 TAC 6.8(b)(3)
RIM2044	1.2.012	Records Inventories	Worksheets or working papers used to capture records inventory information, including location tracking and to document existence and requirements of a records series.	AC	0			AC=Date superseded or discontinued.		Inventories may be held either at the departmental level (by Records Management Coordinators) or agency level (by the Records Management Officer).	
RIM2121	1.2.005	Records Retention Schedule (SLR 105) and Development Files	Includes records retention schedules and working files. Working files document the development, revision, approval, and certification of the schedule.	AC	0			AC=As long as administratively valuable after superseded.		Original retention schedules are retained by the State and Local Records Management Division, Texas State Library and Archives Commission.	
RIM2123	1.2.000	Records Management Program Compliance Records	Files demonstrating departmental and program compliance with state rules and agency policies for records and information management.	FE	10						
ORM1000	1.1.067	Risk Management Annual Report		AC	10			AC=Date of report.	O		
ORM1001	3.2.007	Unemployment Compensation Records	Records and documentation relating to unemployment compensation claims, including reimbursement of funds disbursed by Texas Workforce Commission (TWC).	AC	5			AC=After closed, terminated, completed, expired, or settled.			
ORM1002	4.1.000	Accounting Records	Includes monthly premium transfers, vouchers, billing detail, and similar accounting records.	FE	3						



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ORM1003	4.5.002	Annual Financial Statements		FE	30					Annual statements must be kept to compile statistical information.	
RC1000	3.1.000	Driver Training Records and Checks	Motor Vehicle Record (MVR) checks and driver training administration records.	AC	5			AC=Date of inactivity in RMIS system.		UTS 157, Sec. 4: Requirements for Authorized Drivers	
RC1001	5.4.000	Emergency Management Peer Reviews	Assessments of emergency preparedness and planning efforts at UT institutions created to document compliance with Texas Education Code, Section 51.217, Multihazard Emergency Operations Plan: Safety and Security Audit. Also includes checklists and other working files.	AC	7			AC=Report submitted.			Texas Education Code, Sec. 51.217
RC1002	5.4.013	Emergency Response Plans	Plans developed to mitigate the damage of potential events that could endanger an agency's ability to function. Includes disaster preparedness, response, and recovery plans.	US	0						Texas Labor Code, Sec. 412.054
RC1641	5.4.002	Evacuation Plans	Plans for evacuation of agency facilities in cases of emergency.	US	0						
RC1642	5.4.007	Hazardous Material Training Records	Records of training given to employees in an agency hazard communications program. May include but is not limited to date of class, roster of attendees, subjects covered, and instructors.	AC	5			AC=Date of training.			Texas Health and Safety Code, Sec. 502.009(g)



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RC1639	5.4.003	Inspection Records	Fire, safety, and other inspection records of agency facilities and equipment, including orders issued by inspectors to correct deficiencies in compliance with any code or regulations.	AC	3			AC=Date of inspection, or date of the correction of the deficiency if the inspection report reveals a deficiency.		CAUTION: Does not include inspection reports of building construction; see OFPC1948.	
RC1732	1.1.069	Project Safety Reports	Monthly reports from all active construction sites on any incidents that happen on site. Also includes STEP Awards, confirmation emails, certificates, and memos, given to site managers and teams for maintaining low incident numbers.	FE	7						
RC1003	1.1.000	Resource Allocation Program (RAP) Records	Budget reports, summaries, memoranda, and emails supporting the administration of the RAP Program.	FE	10						
RC1640	5.4.000	System Hazard Reports		AC	3			AC=Release of report.			
RC1699	4.7.005	Systemwide Insurance Claim Files	Records documenting requests for payment of a sum of money according to the terms of a policy or contract.	AC	4			AC=Resolution of claim.			
RF1697	5.1.013	Systemwide Insurance Policies	Property and Casualty policies including supporting documentation relevant to the implementation, modification, renewal, or replacement of policies.	AC	20			AC=Expiration or termination of the policy according to its terms and/or claims resolution associated with said policy.		Needed to confirm past policies' coverage as insurance companies are not required to maintain this information.	Texas Government Code, Sec. 441.1855



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RF1698	5.1.013	Systemwide Insurance Policies – WC	Workers' Compensation policies including supporting documentation relevant to the implementation, modification, renewal, or replacement of policies.	AC	50			AC=Expiration or termination of the policy according to its terms and/or claims resolution associated with said policy.		Needed to confirm past policies' coverage as insurance companies are not required to maintain this information.	Texas Government Code, Sec. 441.1855
RWC1707	5.4.001	Accident Reports and Associated Documentation	Accident or occupational disease reports (by supervisors and employees) and other associated reports required to be submitted to the State Office of Risk Management (SORM) or its predecessors or maintained internally on accident frequency.	CE	10					Used in preparing analyses of program experience.	29 CFR 1904.33; 28 TAC 120.1(c)
RWC1708	4.7.005	Claim Files – Workers' Compensation	Claim files used to administer benefits.	AC	50			AC=Resolution of claim.			
SWC1649	5.4.000	Risk Assessment and Monitoring Plans		US	5						
SWC2000	1.1.006	Complaint Investigation Records	Complaints received by the agency and records pertaining to the resolution of the complaints.	AC	2			AC=Date of receipt, action taken, or final resolution of the complaint, whichever comes latest.		CAUTION: If a complaint becomes the subject of litigation, it must be included in and is subject to the minimum retention period of OGC1472.	
SWC2001	3.1.041	Outside Activity Portal Records	Requests and authorizations for secondary employment or outside activities, including volunteer service.	AC	2			AC=Date superseded, obsolete, or date of separation, as applicable.			



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HR1000	3.1.000	Recruitment File	Files maintained on each job posting. Each file typically includes the job posting and approval sheet. As applicable, may also include applications of those who were not selected, notes on the interview process, and related information.	FE	2						
HR1001	3.1.000	Individual Personnel Files	Master personnel record of an individual employee. May include employment applications and all related documents, ADA documents, benefit and enrollment forms, biographical information, complaints/grievances, criminal background check authorizations, Employment Eligibility Verification (Form I-9), performance management documents, employee data change forms, separation documents, and signed acknowledgement forms.	AC	5			AC=Until superseded or separation or termination of employment.		Convenience copies of personnel information held by a department should be retained in accordance with ALL2203.	29 CFR 1620.32(c)
HR1003	3.3.001a	Affirmative Action Plans		FE	5						29 CFR 30.8(e) for apprenticeship records



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*HR1004	3.4.000	Time and Attendance Records	Records documenting individual employee's hours worked, including work schedules and documentation evidencing adherence to or deviation from normal hours for those employees working on fixed schedules. May also include FMLA, LWOP, and other leave records maintained by HR.	FE	4					For leave requests/authorizations maintained only by supervisors, see ALL2203.	Texas Government Code, Section 661.152(d); 40 TAC 815.106(i); 29 CFR 825.500(b)
HR1005	3.3.011	Former Employee Verification Records	Minimum information needed to verify employment. Must include the employee's name, social security number, exact dates of employment, and last known address.	AC	75			AC=Separation or termination of employment.			
HR1006	3.4.008	Sick Leave Pool Documentation	Records documenting number of hours transferred in and out of comprehensive sick leave pool.	FE	3						
HR1007	3.1.038	Public Access Option Form	Form completed and signed by employee or official, or former employee or official, electing to keep home address, home telephone number, social security number, and family information open or confidential under the Texas Public Information Act.	AC	75			AC=Until superseded or separation or termination of employment.			Texas Government Code, Sec. 552.024
HR1008	3.2.008	Direct Deposit Applications/Authorizations		AC	5			AC=Separation or termination of employee or after amendment, expiration, or termination of authorization, whichever sooner.		Ownership of payroll records was transferred to the Office of the Controller; see CON3000.	



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HR1009	3.1.011	Employee Insurance Records – Active and Separated Employees	Includes Beneficiary Designation Group Insurance form, Certification of Group Health Plan Coverage, dependent information, insurance activity, Insurance Enrollment Change form (SSN documents and Medicare; Tobacco Declaration), ERS/TRS documents, and Optional Retirement Plan (ORP) documents such as Vesting/Termination Status forms.	AC	75			AC=Until superseded or separation or termination of employment.			
HR1010	3.1.011	Employee Insurance Records - Retired and Deceased Employees	Includes Beneficiary Designation Group Insurance form, Certification of Group Health Plan Coverage, dependent information, insurance activity, Insurance Enrollment Change form (SSN documents and Medicare; Tobacco Declaration), ERS/TRS documents, and Optional Retirement Plan (ORP) documents such as Vesting/Termination Status forms.	AC	75			AC=Until retirement or death of employee.			
HR1011	3.3.000	Personnel Administration and Compensation Reports	Any reports compiled in the administration of the System workforce. Includes, but is not limited to, EEO reports/supporting documentation and job classification review files.	FE	3					NOTE: Office of Risk Management is the record owner of Texas Workforce Commission (TWC) reports.	
INN1000	4.1.006	Investment Records	Signed Horizon Fund agreements and related documentation.	AC	20			AC=Expiration or termination of agreement.			



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OTIS1000	2.2.017	Help Desk Tickets	Records documenting requests for technical assistance and related correspondence.	AV	0						
OTIS1507	1.1.000	Information Technology Project and Systems Documentation	Project management records, design documentation, feasibility studies, justifications, user requirements, etc.	AV	0						
OTIS1509	5.5.002	Telephone Activity Reports	Telephone logs created for internal documentation purposes; station activity reports of internal listings of incoming/outgoing telephone activity to individual telephone stations; operator call transfers; summary detail reports; and system activity reports of internal listings of all incoming/outgoing agency telephone activity.	AV	0						
OTIS1518	2.1.008	Hardware Documentation	Records documenting operational and maintenance requirements of computer hardware such as operating manuals, hardware/operating system requirements, hardware configurations, equipment control systems, and associated processing files.	AC	0			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



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OTIS1525	5.4.012	Security Access Records	Records relating to the issuance of keys, identification cards, building passes, passwords, signed statements or similar instruments of access to agency or state facilities, equipment, or automated systems. Includes network request forms.	AC	2			AC=Until superseded, date of expiration, or date of termination, whichever sooner.			
OTIS1526	2.2.001	System Monitoring Records	Records used to control and monitor a system, its data, and its security. May include vulnerability scans, intrusion tests, malicious code detection tests, threat and risk assessments, technical security reviews, patch management logs, intrusion detection logs, firewall logs, and related records. May also include records reporting on the levels and patterns of usage of system hardware, software application, or internet resources.	AV	0					The disposal of monitoring records that are automatically overwritten needs not be documented.	
OTIS2128	2.1.007	Software Programs	Internally developed automated software applications, operating system files, and associated processing files, including job control language, programs, applications, scripts, source code, etc.	AC	0			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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OTIS2141	5.2.008	Equipment History	Equipment history file, which may include logbooks and requests for installation, moves, service, repair, etc.	LA	7						
MED1000	17.1.000	JAMP Council Agreements with Participating Schools	Agreements with participating medical schools, general academic teaching institutions, or private/independent institution of higher education as required by Sections 51.829-.831, Texas Education Code.	AC	7			AC=Expiration or termination of the agreement.		Agreements must be renewed every four years.	Texas Education Code, Secs. 51.829-.831
MED1001	1.1.058	JAMP Council Meetings – Agenda, Minutes, and Supporting Documentation		PM					I	ARCHIVES NOTE: JAMP retains permanent record. The archival requirement will be met by sending a copy to the UT System archives, UT Austin.	
MED1002	1.1.026	JAMP Council Meetings – Open Meeting Notices		AC	1			AC=Date of publication in the Texas Register.			
MED1003	1.1.060	JAMP Council Meetings – Recordings	Audiovisual recordings of open meetings.	AC	0	3		AC=Approval of written minutes of the meeting by the JAMP Council.		CAUTION: If no minutes are prepared, the recordings must be retained permanently in accordance with MED1001.	



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MED1004	1.1.066	JAMP Council Reports	Biennial narrative reports to the governor and legislature as required by Texas Education Code, Sec. 51.834. Includes working files and related documentation used in creating final report.	AC	6			AC=September 1 of odd-numbered calendar years.		ARCHIVES NOTE: Four copies of the published report must be sent to the Texas State Publications Depository Program, Texas State Library and Archives Commission, per 13 TAC 3.3. Working files and related documentation used in creating the final report may be destroyed of at the expiration of the retention period.	Texas Education Code, Sec. 51.834
MED1005	1.3.001	Media	Podcasts, videos, and similar audiovisual recordings produced for public distribution.	AC	2			AC=Until discontinued and no longer administratively valuable.	○	CAUTION: Media files must be saved in a location that is under UT System control, per 13 TAC 6.94.	
MED1006	1.3.002	Media Production Files	Images, sound clips, or other design elements used in the production of media recordings.	AV	0				○		
*MED1007	1.1.061	JAMP Council Meetings - Notes	Notes taken during the meetings from which written minutes are prepared.	AC			90	AC=Approval of the written minutes of the meeting by the JAMP Council.			
MED1460	15.1.000	JAMP Student Applications and Student Agreements	Applications to the JAMP program including all supporting documentation, agreements with the JAMP Council required by Section 51.828, Education Code, and any other records pertaining to an individual applicant.	AC	10			AC=End of application cycle.			Texas Education Code, Sec. 51.828



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MED1463	15.1.000	TMDSAS Student Applications	Applications submitted to the Texas Medical & Dental Schools Application Service and all supporting documentation.	AC	10			AC=End of application cycle.			
ULA1001	5.1.010	Commingling Permits		AC	4			AC=Expiration date of permit.			
ULA1002	1.1.000	Document Control		US	0						
ULA1003	4.1.000	Gas Charge and Penalty Charge Vouchers	Includes working papers.	FE	10						
ULA1004	4.1.000	Gas Purchase Statements		FE	3						
ULA1005	4.1.000	Gas Royalty Ledgers and Penalty Ledgers		FE	10						
ULA1006	4.1.000	Income and Income Penalty Vouchers	Includes working papers.	FE	10						
ULA1007	4.1.000	Oil Charge and Oil Penalty Charge Vouchers		FE	10						
ULA1008	4.1.000	Oil Royalty Ledgers and Oil Penalty Ledgers		FE	10						
ULA1009	4.5.000	Price Bulletins		FE	10						
ULA1010	4.1.000	Remittance by Document (UT-3)		FE	10						
ULA1011	4.5.000	Summaries-Penalty and Interest on Late Payments		FE	10						
ULA1012	5.1.001	Take In Kind (TIK) Oil and Gas Contracts		AC	7			AC= Expiration or termination of the instrument according to its terms.			Texas Government Code, Sec. 441.1855



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ULA1013	1.1.000	Unplugged Well Report		US	0						
ULA1014	1.1.069	Weekly Letter	Report provided to university departments detailing oil and gas resources and compliance.	PM							
ULA1015	1.1.000	Well Record History	Master history record; includes information found in ULA1016 and ULA1017.	PM							
ULA1016	1.1.000	Well Records (Plat Books)		AV	0						
ULA1017	1.1.000	Well Tickets	Historical information used for exploration and development of oil and gas resources.	AV	0						
ULB1001	4.1.009	Accounts Receivable Ledgers	Related to West Texas oil and gas operations.	FE	3						
ULB1002	4.8.001	Bank Statements		FE	3						
ULB1003	4.9.001	Budgets and Budgeting Records	Includes encumbrances and documentation about budget transfers and revisions, as well as detail charts of accounts.	FE	3						
ULB1004	4.1.000	Damage Account Detail by Lease		AC	10			AC=Date created.			
ULB1005	4.5.000	FAWP (Funds for Agriculture and Wildlife Projects) Applications		FE	3						
ULB1006	4.5.000	FAWP (Funds for Agriculture and Wildlife Projects) Applications - Summary		AC	20			AC=Date created.			



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ULB1007	4.5.000	Grazing Lease - Animal Unit Reports		AC	30			AC=Date created.			
ULB1008	4.1.009	Grazing Lessees' Livestock Change Forms	Forms received from lessees that document changes in the number of livestock on university lands. Used to calculate billing.	FE	3						
ULB1009	4.1.000	Grazing Lessees' Payment Calculations		AC	10			AC=Date created.			
ULB1010	5.1.012	Livestock Market Prices	Information used to calculate the per-animal-unit amount.	AC	10			AC=Date created.			
*ULB1011	4.1.001	Purchasing Journal Vouchers		FE	3						
ULB1012	4.1.000	Refund Vouchers--ULAO Copy		FE	10						
ULB1013	4.1.000	Surface Ledgers (Brine, Saltwater, Disposal, Grazing, Surface, and Water)		FE	10						
ULB1014	4.5.002	Variance Report		FE	10						
ULB1015	5.6.005	Vehicle Use Reports	Includes mileage, fuel/oil consumption, passengers carried and other related operational information.	FE	3						
ULE1001	1.1.000	Technical Well Files		PM							
ULG1001	1.1.000	Electric Logs		PM							
ULG1002	1.1.000	Geophysical Contour Maps	Source for evaluating acreage for oil and gas leases.	AV	0						
ULT1001	5.1.000	Lease Maps	Used for exploration and compliance.	US	0					Maps are paper and Mylar film.	Texas Education Code, Sec. 66.77



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ULT1002	5.1.000	Maps of University Lands	Project files used to create hard copy maps.	US	0					Necessary for historical value.	Texas Education Code, Sec. 66.77
ULT1003	2.1.007	Software Programs		AC	0			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.			
ULL1001	5.1.001	Gas and Oil Contracts	Contracts governing operator's sale of oil or gas.	PM							Texas Government Code, Sec. 441.1855
ULL1002	5.1.001	Lease Agreements, Unit Agreements, and Assignments		PM							Texas Government Code, Sec. 441.1855
ULL1003	5.1.001	Lease Assignment Briefs		PM							
ULL1004	5.1.000	Lease Sale Information		AV	0						
ULL1005	5.1.000	Lease Sale Nominations Information	Confidential information used to compile listing of tracts to be offered for oil and gas leasing.	AC	5			AC=Date created.			
ULL1006	5.1.000	Lease Sale Results	Historical reference data of oil and gas leasing.	PM							
ULL1007	1.1.000	Pugh Clause Data - Development Compliance	Information used for exploration and development of oil and gas resources.	AV	0						
ULR1001	5.1.000	Abandoned Line Records		AC	0			AC=Line has been removed.		Environmental Compliance.	



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ULR1002	5.1.000	Brine Lease Data		PM							
ULR1003	4.7.000	Easements on U. T. Lands		PM							
ULR1004	5.2.000	Rate and Damage Schedules	Information used to help determine new fee structures on U.T. Lands. Based on information in expired leases.	AC	50			AC=Date created.			
ULR1005	5.1.001	Saltwater Disposal Agreements		AC	7			AC=Expiration or termination of the instrument according to its terms.			Texas Government Code, Sec. 441.1855
ULR1006	1.1.000	Water and Hard Minerals Prospect Permits and Supporting Data		PM							
ULR1007	5.2.000	Water Books/Management Records		PM						Maintained permanently for environmental and historical purposes.	
ULS1001	1.1.000	Geophysical Survey Permits and Supporting Documents	Information used for exploration and development of oil and gas leases.	AV	0						
ULS1002	5.1.000	Grazing Easements on U. T. Lands		PM						Maintained for historical purposes.	
ULS1003	5.1.001	Surface Leases		PM							Texas Government Code, Sec. 441.1855
ULS1004	1.1.000	Wildlife Harvest Recommendations		AC	30			AC=Date created.		Midland record is sole record.	