



August 30, 2012

Ms. Malinda Potynski
Executive Asst. to Chancellor and President
Texas Woman's University
P.O. Box 425587, TWU Station
Denton, TX 76204-5587

RE: Texas Woman's University
Retention schedule approved for use.

State and Local
Records Management

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

4400 Shoal Creek Blvd.
Austin, Texas
78756

www.tsl.state.tx.us

Commission Chairman
Michael C. Waters

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

Director and Librarian
Peggy D. Rudd

Assistant State Librarian
Edward Seidenberg

Dear Ms. Potynski:

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 Please ensure all old copies of the schedule are superseded with this recertified copy.

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

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

Your efforts in maintaining an up-to-date records retention schedule are appreciated. It not only helps to ensure the integrity of your recordkeeping practices, but it is also essential to the success of your records management program. Your schedule will be due for recertification on the last working day of August 2015. If you have any questions, call the information analyst assigned to your agency, Angela Ossar, at 512-463-6623.

Sincerely,

Craig Kelso
Director and State Records Administrator

Enclosure

cc: State Auditor, State Archivist
cc: (without enclosure) Ann Stuart

*Preserving yesterday,
informing today,
inspiring tomorrow.*

R01-731/731



Texas
State Library
and Archives
Commission

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 731

Agency Name Texas Woman's University

(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 *Malinda Potynski*

Name *(Print or type)* Malinda Potynski

Date February 20, 2012

Section 2. Approvals

(Submitting agencies do not write in this section)

State Auditor's Office

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

Signature _____

Name *(Print or type)* _____

Date _____

Not Required at This Time

Texas State Library and Archives Commission

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

Signature *Peggy D. Rudd*

Name *(Print or type)* Peggy D. Rudd

Date 8/23/12

Cert/Recert No. 9 Amendment No. _____



STATE OF TEXAS Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 1 of 31

2. Agency Code 731		3. Agency Name TEXAS WOMAN'S UNIVERSITY							
Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

ACADEMIC AFFAIRS									
1.1.007	A.1	General Files	AC+4		AC+4	O	AC=Academic year		
1.1.	A.2	Coordinating Board Files	10		10	O	Files document degree programs		
3.1.018	A.3	Student & Faculty Appeals	AC+2		AC+2	O	AC=Final decision on grievance		
1.1.024	A.4	University Strategic Planning	AC+3		AC+3	O	AC=Implementation of strategic plan		
3.1	A.5	Faculty Position Search Files	AC+3		AC+3		AC=When position filled		
3.1	A.6	Faculty Personnel Files	AC+3	PM	AC+3+PM	O	Regular and adjunct faculty files; emeritus faculty files kept PM; AC=employment term		
1.1	A.7	Faculty Workload Files	AC+7		AC+7	I	Audit document to verify compliance with workload policy; precursor report for CBM-008 faculty reports; AC=Publication or release of final audit findings		

<p><i>Retention Codes (Field 7)</i></p> <p>AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value</p> <p>CE – Calendar Year End FE – Fiscal Year End</p>	<p><i>Archival Codes (Field 8)</i></p> <p>I – Retain in University Archives O – Review by University Archivist</p>
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SLR 105

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2. Agency Code 731		3. Agency Name TEXAS WOMAN'S UNIVERSITY							
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			Agency	Storage	Total				

1.1.002	A.8	Coordinating Board CBM-008 Faculty Report	AC+7		AC+7	Audit report to verify compliance with faculty workload policy; Precursor report for State cost studies; AC=Publication or release of final audit findings.		
4.5.006	A.9	Academic Budget/Personnel Operating Files	FE+3		FE+3	Files document faculty & academic personnel daily operating; Budget work papers		
4.5.006	A.10	Summer Budget Files (Academic)	FE+3		FE+3			
4.5.006	A.11	Annual Budget Planning Files (Academic)	AC+5		AC+5	AC=Academic year end		
1.1.058	A.12	Curriculum Committee Agenda/Minutes/Proposals	PM		PM	I Document course descriptions and syllabi; record copy maintained in University archives		
	A.13	Course Inventories	AC+3		AC+3	O AC=Academic year; document current/historical curriculum inventories		

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SLR 105

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2. Agency Code 731		3. Agency Name TEXAS WOMAN'S UNIVERSITY							
Records Series Item No.	Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

1.1.055	A.14	Strategic Plans	AC+6	AC+6	A	AC=September 1 of odd numbered calendar years; ARCHIVES NOTE: The archival requirement is met by sending the required copies of the plans to the Texas State Publications Depository Program, Texas State Library and Archives Commission.		
	A.14	Articulation Agreements	AC+9	AC+9		AC=Expiration or termination of the agreement according to its terms		
3.1.039	A.15	Ombudsman Records	AC	AC		AC=Final decision or matter closed		
	A.16	Federation of North Texas Area Universities-Graduate School Cross Registration Records	4	4	O	Cross registration with partner universities; enrollment verification and statistics		
5.2.026	A.17	Classroom Reservation Logs	2	2				
5.2.027	A.18	Space Utilization Reports	AV	AV				

Retention Codes (Field 7)

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

CE – Calendar Year End
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LA – Life of Asset
MO – Months

PM – Permanent
US – Until Superseded

Archival Codes (Field 8)

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O – Review by University Archivist



STATE OF TEXAS Records Retention Schedule

SLR 105

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2. Agency Code 731		3. Agency Name TEXAS WOMAN'S UNIVERSITY							
Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total	9. Remarks	O		

1.1.013	A.19	Calendars, Appointment and Itinerary Records	CE + 1		CE + 1				
		ADMISSIONS/REGISTRAR STUDENT RECORDS							
1.1.024	C.1	Planning Records (Office)	AC + 3		AC + 3	O	AC=Decision made to implement or not to implement result of planning process		
5.1.014	C.2	Policies/Procedures (Office)	US + 1 + AV		US + 1 + AV				
1.1	C.3	Working Files	AV		AV				
	C.4	Admissions Credentials - Not Applied	PM		PM				
	C.5	Applications – Not Enrolled	PM		PM				
	C.6	TWU Academic Calendar	AV		AV	I	Record copy maintained in University archives		
	C.7	Course Equivalencies	US		US				
	C.8	Immigration Files	PM		PM				
	C.9	4 th /12 th Day Class Rolls	PM		PM				

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STATE OF TEXAS Records Retention Schedule

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2. Agency Code 731		3. Agency Name TEXAS WOMAN'S UNIVERSITY							
Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

Records Series Item No.	Agency Item No.	Record Series Title	Agency	Storage	Total	Archival	Remarks	106 No.	TSLAC ONLY Amend. No.
	C.10	Audit Cards	PM		PM				
1.3.001	C.11	University Catalog	AC+2		AC+2	I	AC=Until superseded or obsolete; Record copy maintained in University archives; ARCHIVES NOTE: The required copies of the catalogs should be sent to the State Publications Depository Program, Texas State Library and Archives Commission		
	C.12	Grade Changes/Grade Sheets	PM		PM				
	C.13	Add/Drop Class Forms	PM		PM				
	C.14	Commencement Programs	US		US	I	Record copy maintained in University archives		
	C.15	Degree Plan Audits	PM		PM				
	C.16	Student Files/Academic Records	PM		PM				
	C.17	Class Schedules	US		US	I	Record copy maintained in University archives		
	C.18	Course Changes	PM		PM				

Retention Codes (Field 7)

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Archival Codes (Field 8)

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2. Agency Code 731		3. Agency Name TEXAS WOMAN'S UNIVERSITY							
Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total				9. Remarks

	C.19	Student Info Changes (personal info)	PM		PM			
	C.20	Transcript Requests	AC + 1		AC + 1		AC = Date submitted	
	C.21	Tuition Code Changes	PM		PM			
	C.22	University Withdrawal Records	PM		PM			
	C.23	Verification Forms (attendance/degrees)	1		1			
	C.24	Veterans Administration Certifications	8		8			
1.1.008	C.25	Correspondence	2 + AV		2 + AV			
	C.26	Application for Incomplete	PM		PM			
	C.27	Proof of Eligibility	PM		PM			
	C.28	Suspension Contracts	PM		PM			
1.1.013	C.29	Calendars, Appointment and Itinerary Records	CE + 1		CE + 1			
		BURSAR						
4.7	D.1	Semester Trial Balance (Student account info)	FE + 3		FE + 3			
4.2.002	D.2	Student Account Receipts	FE + 3		FE + 3			

<p><i>Retention Codes (Field 7)</i></p> <p>AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value</p> <p>CE – Calendar Year End FE – Fiscal Year End</p>	<p><i>Archival Codes (Field 8)</i></p> <p>I – Retain in University Archives O – Review by University Archivist</p> <p>LA – Life of Asset MO – Months</p> <p>PM – Permanent US – Until Superseded</p>
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Records Retention Schedule

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2. Agency Code 731		3. Agency Name TEXAS WOMAN'S UNIVERSITY							
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			Agency	Storage	Total				

4.2.001	D.3	Deposit Slips	FE+3		FE+3				
1.1.008	D.4	Correspondence	2		2				
4.2	D.5	Emergency Loan Receipts	AC+5		AC+5		AC=Loan paid in full		
4.4.001	D.6	Accounting Records/Transactions	FE+3		FE+3				
		CHANCELLOR/PRESIDENT							
1.1.007	O.1	Associations/Organizations	4		4	O			
1.1.007	O.2	Office Files	4+AV		4+AV	O			
1.1.007	O.3	State Government	4+AV		4+AV	O			
1.1.007	O.4	University Committees	4+AV		4+AV	O			
1.1.070	O.5	Administrative Policies	AC+3		AC+3	O	AC=Completion or termination of program, rules, policies, or procedures		
1.1.008	O.6	General Correspondence	2+AV		2+AV				
1.1.023	O.7	Organizational Charts	US		US	I	Record copy maintained in University archives		
1.2.012	O.8	Record Inventory Sheets	US		US				
1.2.005	O.9	Records Retention Schedule	US		US				

Retention Codes (Field 7)

AC – After Closed, Terminated, Completed, Expired, Settled
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Archival Codes (Field 8)

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2. Agency Code 731		3. Agency Name TEXAS WOMAN'S UNIVERSITY							
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			Agency	Storage	Total				

1.2.010	O.10	Records Disposition Logs	10		10				
1.1.057	O.11	Transitory Information	AC		AC		AC=Purpose of record fulfilled		
1.1.013	O.12	Calendars, Appointment and Itinerary Records	CE+1		CE+1				
		CONTROLLER							
4.1.003	B.1	Processed Checks	FE+3		FE+3				
4.3	B.2	Registers & Journals	FE+3		FE+3				
4.7.008	B.3	Federal/State/Local Grant Awards	AC+3		AC+3		AC=Satisfaction of all Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments (the Common Rule)		
4.5.001	B.4	Grant & Annual Reports (work papers)	FE+3		FE+3				
4.5.002	B.5	Reports	FE+3		FE+3				
4.5.002	B.6	Operating Statements	FE+3		FE+3				
4.3	B.7	Financial Statements & Records	FE+3		FE+3				

Retention Codes (Field 7)

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Archival Codes (Field 8)

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2. Agency Code 731		3. Agency Name TEXAS WOMAN'S UNIVERSITY							
Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

4.1.003	B.8	Bank Account Records & Canceled Checks	FE+3		FE+3				
4.7.007	B.9	Chart of Accounts	FE+3		FE+3				
4.2.007	B.10	Travel Vouchers	FE+3		FE+3				
4.6.002	B.11	Bank Reconciliations	FE+3		FE+3				
4.5.001	B.12	Monthly Work Papers-reports/sales tax	FE+3		FE+3				
1.1.008	B.13	Correspondence	2		2				
4.1.002	B.14	Vouchers & Billings	FE+3		FE+3				
4.7.012	B.15	Signature Authorization	US+ FE+3		US+ FE+3		Security access records; Includes signature cards, petty cash custodian info		

Retention Codes (<i>Field 7</i>)				Archival Codes (<i>Field 8</i>)	
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AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	O – Review by University Archivist	



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SLR 105

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2. Agency Code 731		3. Agency Name TEXAS WOMAN'S UNIVERSITY							
Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

4.5.003	B.16	Annual Financial Report	AC+6		AC+6	I	Record copy maintained in University archives; AC=9/1 of odd numbered calendar year; CAUTION: If an agency does not produce a biennial or annual narrative report as described in item number 1.1.066, then 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.		
4.5.002	B.17	Operating/Financial Statement Info	FE+3		FE+3				
4.4	B.18	General/Miscellaneous Ledgers	FE+3		FE+3				
1.1.002	B.19	State Auditor Audits	AC+7		AC+7		AC=Publication/release of final audit findings		
4.6.001	B.20	Monthly Balancing	FE+3		FE+3				
4.7	B.21	Unclaimed Property	FE+13		FE+13				

Retention Codes (<i>Field 7</i>)				Archival Codes (<i>Field 8</i>)	
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STATE OF TEXAS Records Retention Schedule

SLR 105

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2. Agency Code 731		3. Agency Name TEXAS WOMAN'S UNIVERSITY							
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			Agency	Storage	Total				

5.3.007	B.22	Project Bid Records-Purchasing	FE+3		FE+3				
5.3.007	B.23	Merchandise Bid Records - Purchasing	FE+3		FE+3				
5.2.008	B.24	Service Contracts & Maintenance Agreements-Purchasing	LA+3		LA+3				
5.1.001	B.25	State Purchasing Contract	AC+4		AC+4		AC=Expiration or termination of the agreement according to its terms		
5.3	B.27	Vendor ID Numbers-Purchasing	US		US				
4.2.005	B.28	Purchase Orders	FE+3		FE+3				
1.1.013	B.29	Calendars, Appointment and Itinerary Records	CE+1		CE+1				
FINANCE & ADMINISTRATION									
5.1.001	H.1	Fiscal General Files-contracts/leases	AC+4		AC+4		AC=Expiration of instrument terms		
5.2.002	H.2	Physical Plant/Construction Files	AC+10		AC+10	O	AC=Completion of project		
4.5.006	H.3	Budget Files	FE+3		FE+3				

Retention Codes (<i>Field 7</i>)				Archival Codes (<i>Field 8</i>)	
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2. Agency Code 731		3. Agency Name TEXAS WOMAN'S UNIVERSITY							
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			Agency	Storage	Total				

1.1.008	H.4	General Correspondence	2		2				
1.1.007	H.5	State Government Correspondence	4		4	O			
4.5.005	H.6	US Government Fiscal Reports	FE+3		FE+3				
1.1.004	H.7	Budget Requests	AC+6		AC+6	I	AC=September 1 of odd-numbered calendar years; ARCHIVES NOTE: The archival requirement is met by sending the required copies of the requests of the Texas State Publications Depository Program, Texas State Library and Archives Commission. Only copies of supporting documentation submitted to the Legislative Budget Board are archival.		
5.1.005	H.8	Postage Meter Records	FE+3		FE+3				
5.2.003	H.9	Building Plans/Specifications	LA		LA	O			
5.6.005	H.10	Mileage Reports	FE+3		FE+3				

<p>Retention Codes (Field 7)</p> <p>AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value CE – Calendar Year End FE – Fiscal Year End</p>	<p>Archival Codes (Field 8)</p> <p>I – Retain in University Archives O – Review by University Archivist</p>
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			Agency	Storage	Total				9. Remarks

5.1.013	H.11	Insurance Policies	AC+4		AC+4	AC=Expiration/termination of policy terms		
1.1.068	H.12	Performance Measure Reports	AC+6		AC+6	AC=9/1 of odd numbered calendar year		
5.4.007	H.13	Hazardous Materials Training Records	5		5	THSC502.009(g)		
5.4.008	H.14	Hazard Communication Plan	US+5		US+5	THSC502.009(g)		
5.4.009	H.15	Chemical Lists	30		30	THSC502.005(d)		
5.4.010	H.16	Material Safety Data Sheets	AC		AC	AC=After sheets updated or chemical no longer stored		
5.4.003	H.17	Fire Safety Inspection Reports	AC+3		AC+3	AC=Inspection or date deficiency corrected, if one		
5.4.004	H.18	Fire Marshal Orders	AC+3		AC+3	AC=Deficiency corrected		
5.4.012	H.19	Key Requests (security access records)	AC+2		AC+2	AC=Date superseded, expired, terminated, whichever sooner		
5.3	H.20	Delivery Tickets	2+AV		2+AV			
5.2.014	H.21	Property & Equipment Inventory	FE+3		FE+3			
4.1.006	H.22	Investment Working Files	FE+3		FE+3	Includes info on bank accounts		

Retention Codes (<i>Field 7</i>)				Archival Codes (<i>Field 8</i>)	
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4.7.010	H.23	Annuities & Bond Information	AC+3		AC+3	AC=Retirement of debt		
4.1.006	H.24	Yearly Investment Transactions & Monthly Reports	FE+3		FE+3			
4.7.004	H.25	Building Furnishings Files	LA+3		LA+3			
5.2.021	H.26	Surplus Property Sales Data Sheets	FE+3		FE+3			
5.2.014	H.27	Inventory – Annual Physical	FE+3		FE+3			
1.1.013	H.28	Calendars, Appointment and Itinerary Records	CE+1		CE+1			
		FINANCIAL AID						
4.7	G.1	Scholarship Donor Files & Financial Aid Work Papers	AC	5	AC+5	AC=Academic year		
4.7	G.2	Student Loan Collection Files	AC	5	AC+5	AC=Date of last action		
4.7	G.3	Student Financial Aid Files	AC	5	AC+5	AC=Date of last action		
4.5.005	G.4	Federal & State Reports	FE+3		FE+3			

Retention Codes (Field 7)

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

CE – Calendar Year End
FE – Fiscal Year End

LA – Life of Asset
MO – Months

PM – Permanent
US – Until Superseded

Archival Codes (Field 8)

I – Retain in University Archives
O – Review by University Archivist



STATE OF TEXAS Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 15 of 31

2. Agency Code 731		3. Agency Name TEXAS WOMAN'S UNIVERSITY							
Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

4.7	G.5	Student Loan Promissory Notes	AC	5	AC+5	AC=Loan fully repaid		
1.1.013	G.6	Calendars, Appointment and Itinerary Records	CE+1		CE+1			
		GENERAL COUNSEL						
1.1.008	I.1	Correspondence	2+AV		2+AV			
1.1.007	I.2	University Operations Correspondence	4		4	O		
1.1.021	I.3	Public Info. Requests-Exempted	AC+2		AC+2	AC=Request denied/exempt		
1.1.020	I.4	Public Info. Requests-Non Exempted	AC+1		AC+1	AC=Request fulfilled		
1.1.058	I.5	Board of Regents Agendas and Minutes	PM		PM	I Meeting minutes/agenda		
5.1.001	I.6	Contracts	AC+4		AC+4	AC=Termination/expiration of contract		

<p><i>Retention Codes (Field 7)</i></p> <p>AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value</p> <p>CE – Calendar Year End FE – Fiscal Year End</p>	<p><i>Archival Codes (Field 8)</i></p> <p>I – Retain in University Archives O – Review by University Archivist</p>
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STATE OF TEXAS Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 731		3. Agency Name TEXAS WOMAN'S UNIVERSITY							
Records Series Item No.	Agency Item No.	Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

1.1.048	I.7	Litigation Files	AC+1		AC+1	O	AC=As applicable, decision of an agency not to file a lawsuit or decision that a lawsuit will not be filed against it on matter; dismissal of a lawsuit for want of prosecution or on motion of the plaintiff, or final decision of a court (or of a court on appeal, if applicable) in a lawsuit.		
1.1.014	I.8	Legal Opinions/Advice	AV		AV	O			
1.1.059	I.9	Meetings, Certified Agendas or Tape Recordings of Closed	AC+2		AC+2		AC=The date of the meeting or completion of pending action involving the meeting whichever is later		
1.1.013	I.10	Calendars, Appointment and Itinerary Records	CE+1		CE+1				
HUMAN RESOURCES									
3.1.001	N.1	Employment Applications (not hired)	2		2		29CFR1602.49(a)		

Retention Codes (Field 7)

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

CE – Calendar Year End
FE – Fiscal Year End

LA – Life of Asset
MO – Months

PM – Permanent
US – Until Superseded

Archival Codes (Field 8)

I – Retain in University Archives
O – Review by University Archivist



STATE OF TEXAS Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 731		3. Agency Name TEXAS WOMAN'S UNIVERSITY							
Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

5.4.001	N.2	Workers Compensation Files	CE+5		CE+5				
3.1.023	N.3	Position/Job Descriptions	AC+4		AC+4		AC=Superseded or job eliminated; 40TAC815.106		
3.3.011	N.4	Employee Files	AC+75		AC+75		AC=Termination of employment		
4.7.005	N.5	EEO/AA Claim Files	AC+3		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, if applicable) in a lawsuit.		

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



STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 731		3. Agency Name TEXAS WOMAN'S UNIVERSITY							
Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total				9. Remarks

3.1.029	N.6	Immigration Reform & Control Act Forms (I-9)	AC+1		AC+1	AC=Termination of employment; CAUTION: Federal regulation requires that INS I-9 forms be retained for 3 years from date of hire or 1 year after separation of the employee, whichever later. Agencies should make certain that the INS I-9 forms for employees who terminate from an agency less than 3 years from date of hire are kept for the 3 year retention period.		
3.2.007	N.7	Unemployment Claims	AC+5		AC+5	AC=Disposition of claim		
3.3.026	N.8	Job Vacancy Files	US+3		US+3			
3.3.004	N.9	Employee Benefit Plans	US+1		US+1	29CFR1627.3(b)(2)		
1.1.056	N.10	ADA Documentation	3		3	29CFR35.105©		
3.4.008	N.11	Sick Leave Pool Documentation	FE+3		FE+3			
3.4.007	N.12	Family Medical Leave	FE+3		FE+3	29CFR825.500		

<p><i>Retention Codes (Field 7)</i></p> <p>AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value CE – Calendar Year End FE – Fiscal Year End LA – Life of Asset MO – Months PM – Permanent US – Until Superseded</p>	<p><i>Archival Codes (Field 8)</i></p> <p>I – Retain in University Archives O – Review by University Archivist</p>
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STATE OF TEXAS Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 731		3. Agency Name TEXAS WOMAN'S UNIVERSITY							
Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total	9. Remarks			

3.1	N.13	Administrative/Professional Position Search Records	AC+3		AC+3	AC=Position filled		
3.1.018	N.14	Employee Complaint/Grievance Records	AC+2		AC+2	AC=Disposition of grievance/complaint; CAUTION: Does not include formal complaints filed by an agency employee with the Equal Employment Office (EEO) of the U.S. Department of Labor. SEE item number 1.1.048		
3.1.012	N.15	Employment Opportunity Announcements	2		2	29CFR1602.49(a)		
3.2.010	N.16	HRIS Reports	AC+4		AC+4	AC= Issuance of report		
3.3.030	N.17	Training Records	US+2		US+2			
3.3.031	N.18	EEO Reports	3		3			
3.3.001	N.19	Affirmative Action Plans	5		5			

Retention Codes (<i>Field 7</i>)	Archival Codes (<i>Field 8</i>)
AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	I – Retain in University Archives O – Review by University Archivist
CE – Calendar Year End FE – Fiscal Year End	PM – Permanent US – Until Superseded
LA – Life of Asset MO – Months	



STATE OF TEXAS Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 731		3. Agency Name TEXAS WOMAN'S UNIVERSITY							
Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

3.1.026	N.20	Criminal History Checks	AC		AC		AC=End of probationary term of the individual's employment [Texas Government Code §411.094(e)]		
3.3.024	N.21	Personnel Policies and Procedures	US+3		US+3				
1.1.013	N.22	Calendars, Appointment and Itinerary Records	CE+1		CE+1				
		INSTITUTIONAL DEVELOPMENT							
1.1	J.1	Donor/Donor Prospects (other than foundations)	5		5	O	Subject to IRS audit		
1.1	J.2	Donor/Donor Prospects – Foundations	5		5	O	Subject to IRS audit		
1.1	J.3	Scholarships, Endowments, Bequests/Life Income	PM		PM	O			
1.1.007	J.4	Alumni Relations Correspondence & General Information	4+AV		4+AV	O			
1.1.008	J.5	General Correspondence	2+AV		2+AV				
1.3.002	J.6	Development Publication Files	US		US	O			

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



STATE OF TEXAS Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 731		3. Agency Name TEXAS WOMAN'S UNIVERSITY							
Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total	I	O		

1.1.013	J.7	Calendars, Appointment and Itinerary Records	CE+1	CE+1				
		INSTITUTIONAL EFFECTIVENESS & RESEARCH						
1.1.065	T.1	Statistical Data Files	AV	AV	I	Record copy maintained in University archives		
1.1.064	T.2	Performance Measures Documentation	FE+3	FE+3	O			
1.1.007	T.3	Correspondence	4	4	O			
1.1.067	T.4	Reports	3	3	O			
1.1.065	T.5	Misc. Surveys	AV	AV	O			

<p><i>Retention Codes (Field 7)</i></p> <p>AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value CE – Calendar Year End FE – Fiscal Year End LA – Life of Asset MO – Months PM – Permanent US – Until Superseded</p>	<p><i>Archival Codes (Field 8)</i></p> <p>I – Retain in University Archives O – Review by University Archivist</p>
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STATE OF TEXAS Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 731		3. Agency Name TEXAS WOMAN'S UNIVERSITY							
Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

1.3.001	T.6	TWU Institutional Fact Book	AC+2		AC+2	I	AC= Until superseded or obsolete; Record copy maintained in University archives CAUTION: Many state publications must be submitted to the Texas State Publications Depository Program, Texas State Library and Archives Commission, by law (Government Code § 441.101-441.406)		
1.1	T.7	TWU Official Statistics	AV		AV	I	Record copy maintained University archives		
1.1.013	T.8	Calendars, Appointment and Itinerary Records	CE+1		CE+1				
INTERNAL AUDITS									
1.1.002	K.1	Completed Audits & Audit Work Papers	AC+7		AC+7		AC= Release of final audit findings		

Retention Codes (Field 7)

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LA – Life of Asset
MO – Months

PM – Permanent
US – Until Superseded

Archival Codes (Field 8)

I – Retain in University Archives
O – Review by University Archivist



STATE OF TEXAS Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 731		3. Agency Name TEXAS WOMAN'S UNIVERSITY							
Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

1.1.013	K.2	Calendars, Appointment and Itinerary Records	CE+1		CE+1				
		LIBRARY							
1.1.007	L.1.0	Administrative Correspondence	4		4	O			
4.3.002	L.1.1	Library Fines Journal	FE+3		FE+3		Automated library system		
	L.2.0	Copyright Release Forms	AV		AV		Automated library system		
	L.3.0	Endeavor/Voyager System Files	US		US		Automated library system		
	L.4.0	Serials Shelf List	US		US		Automated library system		
	L.4.1	Serials-Periodical/Continuing Title History File	US		US		Automated library system		
	L.4.2	Serials-Current Title Record File	US		US		Automated library system		
5.3	L.5.0	Acquisitions Vendor File	US		US		Automated library system		
1.1	L.5.1	Acquisitions Gift File	FE+3		FE+3	O			
4.2.005	L.5.2	Acquisitions Order Records	FE+3		FE+3		Automated library system		
4.1.004	L.5.3	Acquisitions Budget File	FE+3		FE+3		Automated library system		
4.1.001	L.5.4	Acquisitions Voucher File	FE+3		FE+3		Automated library system		
4.1.001	L.5.5	Acquisitions Invoice File	FE+3		FE+3		Automated library system		

Retention Codes (Field 7)

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

CE – Calendar Year End
FE – Fiscal Year End

LA – Life of Asset
MO – Months

PM – Permanent
US – Until Superseded

Archival Codes (Field 8)

I – Retain in University Archives
O – Review by University Archivist



STATE OF TEXAS Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 731		3. Agency Name TEXAS WOMAN'S UNIVERSITY							
Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

5.2.015	L.6.0	Monographs & Media Processing	FE+3		FE+3		Automated library system		
1.1.067	L.6.1	Processing-Annual Report	3		3	O	Tech services electronic		
	L.6.2	Processing-OCLC & Amigos Documentation Distribution List	US		US		OCLC-on-line catalog library; Amigos=bibliographic network system		
	L.6.3	Processing-OCLC Profile/Authorization Numbers	AV		AV				
1.1	L.6.4	Processing - Statistics	FE+3		FE+3		Monthly stats of books/media cataloged, reclassified, withdrawn; automated		
1.1.067	L.7.0	Circulation Annual Stats/Reports	3		3	O	Automated		
5.2	L.7.1	Circulation-Patron Withdrawn Book List	AC		AC		AC=Information kept as long as patron with university		
4.2.002	L.7.2	Circulation Cash Receipt Book	FE+3		FE+3		Automated library system		
1.1.008	L.8.0	Correspondence-Special Collections	4		4				
	L.8.1	University Archives History Files	PM		PM	I			
	L.8.2	University Archives Inventory Files	PM		PM	I			

<p><i>Retention Codes (Field 7)</i></p> <p>AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value</p> <p>CE – Calendar Year End FE – Fiscal Year End</p>	<p><i>Archival Codes (Field 8)</i></p> <p>I – Retain in University Archives O – Review by University Archivist</p>
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SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 731		3. Agency Name TEXAS WOMAN'S UNIVERSITY							
Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

1.3.001	L.8.3	University Archives Agency Publications	PM		PM	I	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)		
	L.8.4	University Self-Study & SACS Accreditation Files	PM		PM	I	SACS=Southern Association of Colleges and Schools		
1.1.067	L.9.0	ILL Annual Report	3		3	O	ILL=Interlibrary loan; electronic		
	L.9.1	ILL Lending Requests	AC+3		AC+3		AC=Request filled; automated library system		
	L.9.2	ILL Transactions	AV		AV		Automated library system		
	L.10.0	HSL Circulation Records	US		US		HSL=Health science library; Automated		
4.2.002	L.10.1	HSL Payment Receipts	FE+3		FE+3		Automated library system		
1.1.067	L.10.2	HSL Activity Records/Repts./Statistics	3		3	O	Automated library system		
	L.10.3	HSL Interlibrary Loans	AV		AV		Automated library system		

Retention Codes (Field 7)

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

CE – Calendar Year End
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LA – Life of Asset
MO – Months

PM – Permanent
US – Until Superseded

Archival Codes (Field 8)

I – Retain in University Archives
O – Review by University Archivist



STATE OF TEXAS Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 731		3. Agency Name TEXAS WOMAN'S UNIVERSITY							
Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

1.1.013	L.11.0	Calendars, Appointment and Itinerary Records	CE+1		CE+1				
		PAYROLL							
3.2.002	M.1	Payroll Reports/Salary Information	4		4		40TAC815.106(i)		
3.2.005	M.2	W-4 Forms	US or AC+4		US or AC+4		AC=Termination of employment; 26CFR31.6001-1(e)(2)		
3.2.008	M.3	Direct Deposit Forms	US		US				
3.4.002	M.4	TRS, Vacation, Sick Leave Reports	FE+3		FE+3		TRS=Teacher retirement system		
3.2.003	M.5	Social Security Reports & Payroll Transactions	AC+4		AC+4		AC=Tax due date, date claim filed, or date tax paid, whichever later; 26CFR31.6001-1(e)(2)		
3.4.006	M.6	Monthly Timesheets	4		4		40TAC815.106(i)		
3.1	M.7	Salary & Contract Letters	PM		PM		Records verify employment; document TRS benefits		
3.1	M.8	Student Work Permits	AC+5		AC+5		AC=Termination of employment		
3.2.009	M.9	Deferred Compensation	AC+5		AC+5		AC=Account totally distributed		
3.2.003	M.10	W-2 Forms	AC+4		AC+4		AC=Termination of employment		

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



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SLR 105

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2. Agency Code 731		3. Agency Name TEXAS WOMAN'S UNIVERSITY							
Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

1.1.013	M.11	Calendars, Appointment and Itinerary Records	CE + 1		CE + 1				
		PUBLIC SAFETY							
5.4	P.1	Service Reports	3		3				
5.4	P.2	Incident Reports	AC + 5		AC + 5		AC = Date of incident		
5.4	P.3	Officers Daily Reports	1		1		("1") per Local Schedule PS, PS 4025-01a		
5.4	P.4	Building Security Records	AV		AV				
5.4	P.5	Motor Vehicle Accident Reports	2 + AV		2 + AV				
1.1.008	P.6	Correspondence	4		4				
5.4	P.7	Building Access Permission Forms	AV		AV				
5.4	P.8	SDPS Criminal Record Checks	AV		AV		SDPS = State Dept. of Public Safety		
5.4	P.9	Service Calls	2		2		("2") per Local Schedule PS, PS4100-05		
5.4	P.10	Daily Activity Log	1		1		("1") per Local Schedule PS, PS4025-01a		

Retention Codes (Field 7)

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MO – Months

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Archival Codes (Field 8)

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2. Agency Code 731		3. Agency Name TEXAS WOMAN'S UNIVERSITY							
Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total	9. Remarks			

5.4	P.11	Radio Log	1		1			
5.4	P.12	Property Registration	5		5		Record of employee valuables in case of theft	
5.6.009	P.13	Vehicle Registration for Parking Decals	US		US		Campus parking decals	
5.4	P.14	Impounds & Releases	AC+4		AC+4		AC=Release date	
5.4	P.15	Parking/Moving Citations	AC+3		AC+3		AC=Citation date	
5.2.017	P.16	Lost & Found Reports	FE+3		FE+3			
5.4	P.17	Appeal Board Decisions	AV		AV		Traffic citation appeals	
1.1.013	P.18	Calendars, Appointment and Itinerary Records	CE+1		CE+1			
		RESEARCH & SPONSORED PROGRAMS						
1.1	R.1	Institutional Review Board Protocols	AC+4		AC+4		AC=Termination date of study; applications, approvals, consent forms	
1.1.058	R.2	Institutional Review Board Files	PM		PM	I		

Retention Codes (Field 7)	Archival Codes (Field 8)
AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	I – Retain in University Archives O – Review by University Archivist
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LA – Life of Asset MO – Months	
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SLR 105

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2. Agency Code 731		3. Agency Name TEXAS WOMAN'S UNIVERSITY							
Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

1.1	R.3	External Grant Proposals-Funded	AC+3		AC+3	AC=Grant completion as specified in guidelines		
1.1	R.4	External Grant Proposals-Denied	3		3			
1.1	R.5	Internal Competition Files-Denied	3		3			
1.1	R.6	Internal Competition Files-Funded	AC+1	PM	AC+1+PM	AC=Grant completion		
1.1	R.7	Institutional Animal Care/Use Committee Protocols	AC+4		AC+4	AC=Protocol approval		
1.1.058	R.8	Institutional Animal Care/Use Committee Files	PM		PM	I		
1.1	R.9	Research Presentation Requests/Travel Assistance Fund	AC+2		AC+2	AC=Academic year		
1.1.013	R.10	Calendars, Appointment and Itinerary Records	CE+1		CE+1			
		TECHNOLOGY & INFORMATION SERVICES						
1.1.008	F.3	Correspondence	2+AV		2+AV			

Retention Codes (Field 7)

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MO – Months

PM – Permanent
US – Until Superseded

Archival Codes (Field 8)

I – Retain in University Archives
O – Review by University Archivist



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Form SLR 105C must accompany this form.

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2. Agency Code 731		3. Agency Name TEXAS WOMAN'S UNIVERSITY							
Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total				9. Remarks

5.2.008	F.5	Equipment/Computer Maintenance	LA+3		LA+3			
2.1.007	F.6	Software Programs	AC		AC	AC=Until records transferred, used in new hard/software, or no records to retain		
2.1.008	F.7	Computer Equipment/Manuals	AC		AC			
2.1.009	F.8	Operating Systems (Technical documentation)	AC		AC	AC= 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.		
2.1	F.9	User Documentation	AV		AV			
5.2.008	F.10	Software Maintenance	LA+3		LA+3			
2.2	F.11	Requests (data-line/key)	AV		AV			
2.2	F.12	Outside Organizations (projects)	AC+5		AC+5	AC=Project complete		

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



STATE OF TEXAS Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 731		3. Agency Name TEXAS WOMAN'S UNIVERSITY							
Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

5.4.013	F.13	Business Continuity Plan	US+1		US+1				
5.5.001	F.14	Telecommunications Billing Detail	FE+3		FE+3				
5.5.002	F.15	Long Distance Phone Logs	AV		AV				
	F.16	AV Software Requests	2		2				
	F.17	Record Permission Forms	AC		AC		AC=Termination of activity requiring permission		
5.4	F.21	Information Security Risk Assessment	US+1		US+1				
1.1.013	F.22	Calendars, Appointment and Itinerary Records	CE+1		CE+1				

<p>Retention Codes (Field 7)</p> <p>AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value CE – Calendar Year End FE – Fiscal Year End</p>	<p>Archival Codes (Field 8)</p> <p>I – Retain in University Archives O – Review by University Archivist PM – Permanent US – Until Superseded</p>
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