

February 28, 2019



Dr. Carine Feyten
Chancellor
Texas Woman's University
P.O. Box 425587, TWU Station
Denton, TX 76204

Re: Agency records retention schedule approved for use.

Dear Dr. Feyten,

Your agency's records retention schedule is approved for use as of February 14, 2019. Your currently approved records retention schedule is available on our website at <https://www.tsl.texas.gov/slrms/state/schedules.html>. Please ensure that all old copies of the schedule are superseded with this recertified copy.

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

Each agency schedule must be reviewed, updated and submitted for recertification annually for the first two years after the initial approval of the schedule and every five years thereafter. The deadline for submission of your schedule for its next recertification is the last working day of February 2024.

During a certification period, changes may need to be made to your schedule. State regulations (13 TAC §6.4) also allow for the submission of amendments to the retention schedule as needed to keep the information in the schedule current. If you are not familiar with the amendment process, or if you have any other questions, please contact the Government Information Analyst assigned to your agency, Bonnie Zuber at 512-463-0188 or bzuber@tsl.texas.gov.

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

Sincerely,

A handwritten signature in blue ink, appearing to read "C. 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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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 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 [Signature]
 Name (Print or type) Dr. Carine Feyten
 Date 2/4/19

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 [Signature]
 Name (Print or type) Gloria Mera
 Date 2/14/19

Cert/Recert No. 10 Amendment No. _____

CAUTION

A state record whose retention period has expired may not be destroyed if any litigation, claim, negotiation, audit, public information request, administrative review, or other action involving the record is initiated; its destruction shall not occur until the completion of the action and the resolution of all issues that arise from it.

A state record whose retention period expires during any litigation, claim, negotiation, audit, public information request, administrative review, or other action involving the record may not be destroyed until the completion of the action and the resolution of all issues that arise from it.



Records Retention Schedule

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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				
ACADEMIC AFFAIRS											
A.1	1.1.007	General Files		AC	4			AC=Academic year	O		
A.2	1.1.	Coordinating Board Files			10				O	Files document degree programs	
A.3	3.1.018	Student & Faculty Appeals		AC	2			AC=Final decision on grievance	O	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.	

Retention Codes (field 7)

AC – See event trigger 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

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A.4	1.1.024	University Strategic Planning		AC	3			AC=Implementation of strategic plan	R	See A.14	Information resources and operational strategic plans prepared in accordance with 2054.095 and 2056.002, Government Code. 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.

<p>Retention Codes (field 7)</p> <p>AC – See event trigger for specific records series definition</p> <p>AV – Administratively valuable</p> <p>CE – Calendar year end</p>	<p>FE – Fiscal year end</p> <p>LA – Life of Asset</p> <p>PM – Permanent</p> <p>US – Until Superseded</p>	<p>Archival Codes (Field 10)</p> <p>A/I – Transfer to State/University Archivist</p> <p>R/O – Review by State/University Archivist</p>
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A.5	3.1	Faculty Position Search Files		AC	3			AC = when position filled by college deans per Provost Office staff			
A.6	3.1	Faculty Personnel Files		AC	3			AC=employment term	O		29 CFR 1602.49(a) [State Universities].
A.6E	3.1	Emeritus Faculty Personnel Files		PM					O		29 CFR 1602.49(a) [State Universities].
A.7	1.1	Faculty Workload Files		AC	7			AC=Publication or release of final audit findings	I	Audit document to verify compliance with workload policy; precursor report for CBM-008 faculty reports;	
A.8	1.1.002	Coordinating Board CBM-008 Faculty Report		AC	7			AC=Publication or release of final audit findings.			
A.9	4.5.006	Academic Budget/Personnel Operating Files	Audit report to verify compliance with faculty workload policy; Precursor report for State cost studies	FE	3					Files document faculty & academic personnel daily operating; Budget work papers	

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A.10	4.5.006	Summer Budget Files (Academic)	Receipt and reconciliation of monthly report.	FE	3						
A.11	4.5.006	Annual Budget Planning Files (Academic)		AC	5			AC=Academic year end		Receipt and reconciliation of annual report.	
A.12	1.1.058	Curriculum Committee Agenda/Minutes/Proposals		PM					I	Document course descriptions and syllabi; record copy maintained in University archives	
A.13		Course Inventories		AC	3			AC=Academic year	O	Document current/historical curriculum inventories	
A.14	1.1.055	Strategic Plans		AC	6			AC=September 1 of odd numbered calendar years	I	ARCHIVES NOTE: The archival requirement is met by sending the required copies of the plans to the Texas State Publications Depository Program, Texas State Library and Archives Commission. See A.4	

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A.14		Articulation Agreements		AC	9			AC=Expiration or termination of the agreement according to its terms			
A.15	3.1.039	Ombudsman Records		AC				AC=Final decision or matter closed		CAUTION: Does not include formal complaint filed with EEO. If matter becomes a grievance or the subject of counseling or litigation, or employee is subject to disciplinary action, the records are subject to retention in the appropriate records series. SEE 1.1.048, 3.1.006, 3.1.018, 3.1.020, and 3.1.021.	
A.16		Federation of North Texas Area Universities- Graduate School Cross Registration Records							O	Cross registration with partner universities; enrollment verification and statistics	
A.17	5.2.026	Classroom Reservation Logs			2						

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A.18	5.2.027	Space Utilization Reports		AV							
A.19	1.1.013	Calendars, Appointment and Itinerary Records		CE	1				O		
ADMISSIONS / REGISTRAR STUDENT RECORDS											
C.1	1.1.024	Planning Records (Office)		AC	3			AC=Decision made to implement or not to implement result of planning process	O		
C.2	5.1.014	Policies/Procedures (Office)		US	1						
C.3	1.1	Working Files		AV							
C.4		Admissions Credentials - Not Applied		PM							
C.5		Applications - Not Enrolled		PM							
C.6		TWU Academic Calendar		AV					I	Record copy maintained in University archives	
C.7		Course Equivalencies		US							
C.8		Immigration Files		PM							

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					Years	Months	Days				
C.9		4th/12th Day Class Rolls		PM							
C.10		Audit Cards		PM							
C.11	1.3.001	University Catalog		AC	2			AC=Until superseded or obsolete	I	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, by law (Government Code 441.101-441.106). Administrative rules of the Texas State Publications Depository Program of the Texas State Library and Archives Commission (13 TAC §§3.1-3.16	
C.12		Grade Changes/Grade Sheets		PM							

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C.13		Add/Drop Class Forms		PM							
C.14		Commencement Programs		US					I	Record copy maintained in University archives	
C.15		Degree Plan Audits		PM							
C.16		Student Files/Academic Records		PM							
C.17		Class Schedules		US					I	Record copy maintained in University archives	
C.18		Course Changes		PM							
C.19		Student Info Changes (personal info)		PM							
C.20		Transcript Requests		AC	1			AC=Date submitted			
C.21		Tuition Code Changes		PM							
C.22		University Withdrawal Records		PM							
C.23		Verification Forms (attendance/degrees)			1						

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C.24		Veterans Administration Certifications			8						
C.25	1.1.008	General Correspondence			2					AV	
C.26		Application for Incomplete		PM							
C.27		Proof of Eligibility		PM							
C.28		Suspension Contracts		PM							
C.29	1.1.013	Calendars, Appointment and Itinerary Records		CE	1				O		
BURSAR											
D.1	4.7	Semester Trial Balance (Student account info)		FE	3						
D.2	4.2.002	Student Account Receipts		FE	3					Maintained in colleague system & paper docs from external agencies, communication, etc. as required by transaction type	
D.3	4.2.001	Deposit Slips		FE	3						

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D.4	1.1.008	General Correspondence			2						
D.5	4.2	Emergency Loan Receipts		AC	5			AC=Loan paid in full		Maintained in Colleague & Oracle Systems	
D.6	4.4.001	Accounting Records/Transactions		FE	3						
CHANCELLOR / PRESIDENT											
O.1	1.1.007	Associations/Organizations (Correspondence)			4				O		
O.2	1.1.007	Office Files (Correspondence)			4				O		
O.3	1.1.007	State Government (Correspondence)			4				O		
O.4	1.1.007	University Committees (Correspondence)			4				O		
O.5	1.1.070	Administrative Policies		AC	3			AC=Completion or termination of program, rules, policies, or procedures	O		
O.6	1.1.008	General Correspondence			2						

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O.7	1.1.023	Organizational Charts		US					I	Record copy maintained in University archives	
O.8	1.2.012	Record Inventory Sheets		US							
O.9	1.2.005	Records Retention Schedule		US							
O.10	1.2.010	Records Disposition Logs			10						
O.11	1.1.057	Transitory Information		AC				AC=Purpose of record fulfilled			
O.12	1.1.013	Calendars, Appointment and Itinerary Records		CE	1				O		
CONTROLLER											
B.1	4.1.003	Processed Checks		FE	3						
B.2	4.3	Registers & Journals		FE	3						

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B.3	4.7.008	Federal/State/Local Grant Awards		AC	3			AC=Satisfaction of all Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments (the Common Rule)			
B.4	4.5.001	Grant & Annual Reports (work papers)		FE	3						
B.5	4.5.002	Reports		FE	3						
B.6	4.5.002	Operating Statements		FE	3						
B.7	4.3	Financial Statements & Records		FE	3						
B.8	4.1.003	Bank Account Records & Canceled Checks		FE	3						
B.9	4.7.007	Chart of Accounts		FE	3						
B.10	4.2.007	Travel Vouchers		FE	3						
B.11	4.6.002	Bank Reconciliations		FE	3						
B.12	4.5.001	Monthly Work Papers-reports/sales tax		FE	3						
B.13	1.1.008	General Correspondence			2						

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B.14	4.1.002	Vouchers & Billings		FE	3						
B.15	4.7.012	Signature Authorization		AC	3			AC = Signature authorization is superseded or recinded.		Security access records; Includes signature cards, petty cash custodian info	
B.16	4.5.003	Annual Financial Report		AC	6			AC = Sept. 1 of odd numbered calendar year.	I	Record copy maintained in University archives; 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.	
B.17	4.5.002	Operating/Financial Statement Info		FE	3						
B.18	4.4	General/Miscellaneous Ledgers		FE	3						
B.19	1.1.002	State Auditor Audits		AC	7			AC=Publication/release of final audit findings			

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B.20	4.6.001	Monthly Balancing		FE	3						
B.21	4.7	Unclaimed Property		FE	13						
B.22	5.3.007	Project Bid Records- Purchasing		AC	7			AC = Expiration of the instrument according to its terms or decision not to proceed with the bid.			
B.23	5.3.007	Merchandise Bid Records - Purchasing		AC	7			AC = Expiration of the instrument according to its terms or decision not to proceed with the bid.			
B.24	5.2.008	Service Contracts & Maintenance Agreements- Purchasing		LA	3						
B.25	5.1.001	State Purchasing Contract		AC	7			AC=Expiration or termination of the agreement according to its terms			
B.27	5.3	Vendor ID Numbers- Purchasing		US							
B.28	4.2.005	Purchase Orders		FE	3						

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B.29	1.1.013	Calendars, Appointment and Itinerary Records		CE	1				O		

FINANCE & ADMINISTRATION

H.1	5.1.001	Fiscal General Files- contracts/leases		AC	7			AC=Expiration of instrument terms			
H.2	5.2.002	Physical Plant/Construction Files		AC	10			AC=Completion of project	O		
H.3	4.5.006	Budget Files		FE	3						
H.4	1.1.008	General Correspondence			2						
H.5	1.1.007	State Government Correspondence			4				O		
H.6	4.5.005	US Government Fiscal Reports		FE	3						

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					Years	Months	Days				
H.7	1.1.004	Budget Requests		AC	6			AC=September 1 of oddnumbered calendar years	I	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 Budge Board are archival.	
H.8	5.1.005	Postage Meter Records		FE	3						
H.9	5.2.003	Building Plans/Specifications		LA					O		
H.10	5.6.005	Mileage Reports		FE	3						
H.11	5.1.013	Insurance Policies		AC	7			AC=Expiration/termination of policy terms			
H.12	1.1.068	Performance Measure Reports		AC	6			AC=9/1 of odd numbered calendar year			
H.13	5.4.007	Hazardous Materials Training Records			5						THSC502.009(g)

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H.14	5.4.008	Hazard Communication Plan		US	5						THSC502.009(g)
H.15	5.4.009	Chemical Lists			30						THSC502.005(d)
H.16	5.4.010	Material Safety Data Sheets		AC				AC=After sheets updated or chemical no longer stored			
H.17	5.4.003	Fire Safety Inspection Reports		AC	3			AC=Inspection or date deficiency corrected, if one			
H.18	5.4.004	Fire Marshal Orders		AC	3			AC=Deficiency corrected			
H.19	5.4.012	Key Requests (security access records)		AC	2			AC=Date superseded, expired, terminated, whichever sooner			
H.20	5.3	Delivery Tickets			2						
H.21	5.2.014	Property & Equipment Inventory		FE	3						
H.22	4.1.006	Investment Working Files		FE	3					Includes info on bank accounts	
H.23	4.7.010	Annuities & Bond Information		AC	3			AC=Retirement of debt			
H.24	4.1.006	Yearly Investment Transactions & Monthly Reports		FE	3						

Retention Codes (field 7)

AC – See event trigger for specific records series definition
 AV – Administratively valuable
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FE – Fiscal year end

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Archival Codes (Field 10)

A/I – Transfer to State/University Archivist
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Records Retention Schedule

1. Agency Code: 731		2. Agency Name: Texas Woman's University									
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				
H.25	4.7.004	Building Furnishings Files		LA	3						
H.26	5.2.021	Surplus Property Sales Data Sheets		FE	3						
H.27	5.2.014	Inventory - Annual Physical		FE	3						
H.28	1.1.013	Calendars, Appointment and Itinerary Records		CE	1				O		

FINANCIAL AID

G.1	4.7	Scholarship Donor Files & Financial Aid Work Papers		AC	5			AC=Academic year			
G.2	4.7	Student Loan Collection Files		AC	5			AC=Date of last action			
G.3	4.7	Student Financial Aid Files		AC	5			AC=Date of last action			
G.4	4.5.005	Federal & State Reports		FE	3						
G.5	4.7	Student Loan Promissory Notes		AC	5			AC=Loan fully repaid			

<p>Retention Codes (field 7)</p> <p>AC – See event trigger for specific records series definition AV – Administratively valuable CE – Calendar year end</p>	<p>FE – Fiscal year end LA – Life of Asset PM – Permanent US – Until Superseded</p>	<p>Archival Codes (Field 10)</p> <p>A/I – Transfer to State/University Archivist R/O – Review by State/University Archivist</p>
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					Years	Months	Days				
G.6	1.1.013	Calendars, Appointment and Itinerary Records		CE	1				O		
GENERAL COUNSEL											
I.1	1.1.008	General Correspondence			2					AV	
I.2	1.1.007	University Operations Correspondence			4				O		
I.3	1.1.021	Public Info. Requests-Exempted		AC	2			AC=Request denied/exempt			
I.4	1.1.020	Public Info. Requests-Non Exempted		AC	1			AC=Request fulfilled			
I.5	1.1.058	Board of Regents Agendas and Minutes		PM					I	Meeting minutes/agenda	
I.6	5.1.001	Contracts		AC	7			AC=Termination/expiration of contract			

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					Years	Months	Days				
I.7	1.1.048	Litigation Files		AC	1			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.	O		
I.8	1.1.014	Legal Opinions/Advice		AV					O		
I.9	1.1.059	Meetings, Certified Agendas or Tape Recordings of Closed		AC	2			AC=The date of the meeting or completion of pending action involving the meeting whichever is later			
I.10	1.1.013	Calendars, Appointment and Itinerary Records		CE	1				O		

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					Years	Months	Days				
HUMAN RESOURCES											
N.1	3.1.001	Employment Applications (not hired)			2						29CFR1602.49(a)
N.2	5.4.001	Workers Compensation Files		CE	5						
N.3	3.1.023	Position/Job Descriptions		AC	4			AC=Superseded or job eliminated			40TAC815.106
N.4	3.3.011	Employee Files		AC	75			AC=Termination of employment		Minimum information needed to verify employment, includes name, social security number, exact dates of employment, last known address and most recent public access option form.	

Retention Codes (field 7) AC – See event trigger 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
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					Years	Months	Days				
N.5	1.1.048	EEO/AA Claim Files		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.			

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					Years	Months	Days				
N.6	3.1.029	Immigration Reform & Control Act Forms (I-9)		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.	
N.7	3.2.007	Unemployment Claims		AC	5			AC=Disposition of claim			
N.8	3.3.026	Job Vacancy Files		US	3						
N.9	3.3.004	Employee Benefit Plans		US	1						29CFR1627.3(b)(2)
N.10	1.1.056	ADA Documentation			3						29CFR35.105©
N.11	3.4.008	Sick Leave Pool Documentation		FE	3						
N.12	3.4.007	Family Medical Leave		FE	3						29CFR825.500

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					Years	Months	Days				
N.13	3.1	Administrative/Professional Position Search Records		AC	3			AC=Position filled			
N.14	3.1.018	Employee Complaint/Grievance Records		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	
N.15	3.1.012	Employment Opportunity Announcements			2						29CFR1602.49(a)
N.16	3.2.010	HRIS Reports		AC	4			AC=Issuance of report			
N.17	3.3.030	Training Records		US	2						
N.18	3.3.031	EEO Reports			3						
N.19	3.3.001	Affirmative Action Plans			5						
N.20	3.1.026	Criminal History Checks		AC				AC=End of probationary term of the individual's employment			[Texas Government Code §411.094(e)]
N.21	3.3.024	Personnel Policies and Procedures		US	3						

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					Years	Months	Days				
N.22	1.1.013	Calendars, Appointment and Itinerary Records		CE	1				O		
INSSTITUTIONAL DEVELOPMENT											
J.1	1.1	Donor/Donor Prospects (other than foundations)			5				O	Subject to IRS audit	
J.2	1.1	Donor/Donor Prospects - Foundations			5				O	Subject to IRS audit	
J.3	1.1	Scholarships, Endowments, Bequests/Life Income		PM					O		
J.4	1.1.007	Alumni Relations Correspondence & General Information			4				O		
J.5	1.1.008	General Correspondence			2					AV	
J.6	1.3.002	Development Publication Files		US					O		
J.7	1.1.013	Calendars, Appointment and Itinerary Records		CE	1				O		

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					Years	Months	Days				
INSTITUTIONAL EFFECTIVENESS & RESEARCH											
T.1	1.1.065	Statistical Data Files		AV					I	Record copy maintained in University archives	
T.2	1.1.064	Performance Measures Documentation		FE	3				O		
T.3	1.1.007	Administrative Correspondence			4				O		
T.4	1.1.067	Reports			3				O		
T.5	1.1.065	Misc. Surveys		AV					O		
T.6	1.3.001	TWU Institutional Fact Book		AC	2			AC= Until superseded or obsolete	I	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)	
T.7	1.1	TWU Official Statistics		AV					I	Record copy maintained University archives	

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					Years	Months	Days				
T.8	1.1.013	Calendars, Appointment and Itinerary Records		CE	1				O		

INTERNAL AUDITS

K.1	1.1.002	Completed Audits & Audit Work Papers		AC	7			AC=Release of final audit findings			
K.2	1.1.013	Calendars, Appointment and Itinerary Records		CE	1				O		

LIBRARY

L.1.0	1.1.007	Administrative Correspondence			4				O		
L.1.1	4.3.002	Library Fines Journal		FE	3					Automated library system	
L.2.0		Copyright Release Forms		AV						Automated library system	
L.3.0		Endeavor/Voyager System Files		US						Automated library system	
L.4.0		Serials Shelf List		US						Automated library system	
L.4.1		Serials-Periodical/Continuing Title History File		US						Automated library system	

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					Years	Months	Days				
L.4.2		Serials-Current Title Record File		US						Automated library system	
L.5.0	5.3	Acquisitions Vendor File		US						Automated library system	
L.5.1	1.1	Acquisitions Gift File		FE	3				O		
L.5.2	4.2.005	Acquisitions Order Records		FE	3					Automated library system	
L.5.3	4.1.004	Acquisitions Budget File		FE	3					Automated library system	
L.5.4	4.1.001	Acquisitions Voucher File		FE	3					Automated library system	
L.5.5	4.1.001	Acquisitions Invoice File		FE	3					Automated library system	
L.6.0	5.2.015	Monographs & Media Processing		FE	3					Automated library system	
L.6.1	1.1.067	Processing-Annual Report			3				O	Tech services electronic	
L.6.2		Processing-OCLC & Amigos Documentation Distribution List		US						OCLC-on-line catalog library; Amigos=bibliographic network system	

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					Years	Months	Days				
L.6.3		Processing-OCLC Profile/Authorization Numbers		AV							
L.6.4	1.1	Processing - Statistics		FE	3					Monthly stats of books/media cataloged, reclassified, withdrawn; automated	
L.7.0	1.1.067	Circulation Annual Stats/Reports			3				O	Automated	
L.7.1	5.2	Circulation-Patron Withdrawn Book List		AC				AC=Information kept as long as patron with university			
L.7.2	4.2.002	Circulation Cash Receipt Book		FE	3					Automated library system	
L.8.0	1.1.008	General Correspondence-Special Collections			4						
L.8.1		University Archives History Files		PM					I		
L.8.2		University Archives Inventory Files		PM					I		

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

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					Years	Months	Days				
L.11.0	1.1.013	Calendars, Appointment and Itinerary Records		CE	1				O		

PAYROLL

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

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					Years	Months	Days				
M.10	3.2.003	W-2 Forms		AC	4			AC=Termination of employment			
M.11	1.1.013	Calendars, Appointment and Itinerary Records		CE	1				O		
PUBLIC SAFETY											
P.1	5.4	Service Reports			3						
P.2	5.4	Incident Reports		AC	5			AC=Date of incident			
P.3	5.4	Officers Daily Reports			1						
P.4	5.4	Building Security Records		AV							
P.5	5.4.001	Motor Vehicle Accident Reports		CE	5						
P.6	1.1.008	General Correspondence			4						
P.7	5.4	Building Access Permission Forms		AV							
P.8	5.4	TxDPS Criminal Record Checks		AV							
P.9	5.4	Service Calls			2						
P.10	5.4	Daily Activity Log			1						
P.11	5.4	Radio Log			1						

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P.12	5.4	Property Registration			5					Record of employee valuables in case of theft	
P.13	5.6.009	Vehicle Registration for Parking Decals		US						Campus parking decals	
P.14	5.4	Impounds & Releases		AC	4			AC=Release date			
P.15	5.4	Parking/Moving Citations		AC	3			AC=Citation date			
P.16	5.2.017	Lost & Found Reports		FE	3						
P.17	5.4	Appeal Board Decisions		AV						Traffic citation appeals	
P.18	1.1.013	Calendars, Appointment and Itinerary Records		CE	1				O		

RESEARCH & SPONSORED PROGRAMS

R.1	1.1	Institutional Review Board Protocols		AC	4			AC=Termination date of study		Applications, approvals, consent forms	
R.2	1.1.058	Institutional Review Board Files		PM					I		
R.3	1.1	External Grant Proposals-Funded		AC	3			AC=Grant completion as specified in guidelines			
R.4	1.1	External Grant Proposals-Denied			3						

Retention Codes (field 7)

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Retention Codes (field 7) - Continued

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					Years	Months	Days				
R.5	1.1	Internal Competition Files-Denied			3						
R.6	1.1	Internal Competition Files-Funded		AC				AC=Grant completion			
R.7	1.1	Institutional Animal Care/Use Committee Protocols		AC	4			AC=Protocol approval			
R.8	1.1.058	Institutional Animal Care/Use Committee Files		PM					I		
R.9	1.1	Research Presentation Requests/Travel Assistance Fund		AC	2			AC=Academic year			
R.10	1.1.013	Calendars, Appointment and Itinerary Records		CE	1				O		

TECHNOLOGY & INFORMATION SERVICES

F.3	1.1.008	General Correspondence			2					AV	
F.5	5.2.008	Equipment/Computer Maintenance		LA	3						

Retention Codes (field 7)

AC – See event trigger 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

Records Retention Schedule

1. Agency Code: 731		2. Agency Name: Texas Woman's University									
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				
F.6	2.1.007	Software Programs		AC				AC = Until electronic records are transferred to and made usable in a new software environment or there are no electronic records being retained to meet an approved retention period that require the software to be retrieved and read.		CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.	13 TAC 6.94.
F.7	2.1.008	Computer Equipment/Manuals		AC				AC = Until electronic records are transferred to and made usable in a new hardware environment or there are no electronic records being retained to meet an approved retention period that require the hardware to be retrieved and read.		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.

Retention Codes (field 7)

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Records Retention Schedule

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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				
F.8	2.1.009	Operating Systems (Technical documentation)		AC				AC = Until electronic records are transferred to and made usable in a new hardware or software environment with new documentation or there are no electronic records being retained to meet an approved retention period that require the documentation to be retrieved and read.		CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.	13 TAC 6.94.
F.9	2.1	User Documentation		AV							
F.10	5.2.008	Software Maintenance		LA	3						
F.11	2.2	Requests (data-line/key)		AV							
F.12	2.2	Outside Organizations (projects)		AC	5			AC=Project complete			
F.13	5.4.013	Business Continuity Plan		US	1						
F.14	5.5.001	Telecommunications Billing Detail		FE	3						

Retention Codes (field 7)

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Records Retention Schedule

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					Years	Months	Days				
F.15	5.5.002	Long Distance Phone Logs		AV							
F.16		AV Software Requests			2						
F.17		Record Permission Forms		AC				AC=Termination of activity requiring permission			
F.21	5.4	Information Security Risk Assessment		US	1						
F.22	1.1.013	Calendars, Appointment and Itinerary Records		CE	1				O		

Retention Codes (field 7)

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