



December 3, 2013

Mr. Joe Vorsas  
Associate Vice President for Human Resources  
UT at Tyler  
3900 University Blvd  
Tyler, TX 75799

RE: Agency records retention schedule approved for use

Dear Mr. Vorsas:

Your agency's records retention schedule is approved for use as of December 2, 2013. Your currently approved records retention schedule is available on our website at <https://www.tsl.state.tx.us/slrn/state/schedules.html>. Please ensure all old copies of the schedule are superseded with this recertified copy.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. 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.

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 triennially thereafter. The deadline for submission of your schedule for its next recertification is the last working day of **December 2016**.

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, Angela Ossar, at 512-463-6623 or [aossar@tsl.state.tx.us](mailto:aossar@tsl.state.tx.us).

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,

Craig Kelso  
Director and State Records Administrator

Enclosure

cc: State Auditor, State Archivist  
cc: (without enclosure) Rodney H. Mabry

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](http://www.tsl.state.tx.us)

*Commission Chairman*  
Michael C. Waters

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

*Director and Librarian*  
Mark Smith

*Preserving yesterday,  
informing today,  
inspiring tomorrow.*

R01.750/75



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 750  
Agency Name The University of Texas at Tyler

*(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 

Name (Print or type) Joe Vorsas

Date 7/22/2013

## Section 2. Approvals

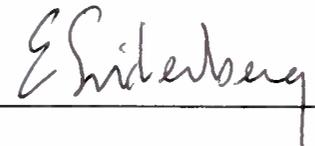
*(Submitting agencies do not write in this section)*

**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   
Name (Print or type) \_\_\_\_\_  
Date 12-02-2013

Cert/Recert No. 5 Amendment No. \_\_\_\_\_

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## CAUTION

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

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





# STATE OF TEXAS Records Retention Schedule

SLR 105  
Form SLR 105C must  
accompany this form.

	2. Agency Code <b>750</b>	3. THE UNIVERSITY OF TEXAS AT TYLER								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period <b>Agency Storage Total</b>		8. Archival	9. Remarks	10. 106 No.	11. TSLAC USE ONLY		
	ATH01	STUDENT-ATHLETE EDUCATION RECORDS (INCLUDING STUDENT-ATHLETE STATEMENT, HIGH SCHOOL AND ALL COLLEGE TRANSCRIPTS, PRECOLLEGE TEST SCORES AND RELATED INFORMATION AND CORRESPONDENCE. RECORDS CONCERNING FINANCIAL AID, OTHER DOCUMENTS OBTAINED PERTAINING TO NCAA ELIGIBILITY	AC+6	AC+6		Subject to NCAA Investigative Review. AC= Graduation or date of last attendance.				
	ATH02	NCAA [NATIONAL COLLEGIATE ATHLETIC ASSOCIATION] COMPLIANCE RECORD (INCLUDING CERTIFICATION OF COMPLIANCE FORM, STUDENT-ATHLETE STATEMENT, DRUG TESTING CONSENT FORM, STUDENT-ATHLETE AFFIRMATION	6	6		Subject to NCAA Compliance.				
	ATH04	NCAA COMPLIANCE RECORDS (INCLUDING INFORMATION AND SPORTS SPONSORSHIP, AND DESIGNATION OF INSTITUTIONAL REPRESENTATIVES)	6	6						
	ATH05	ASC [AMERICAN SOUTHWEST CONFERENCE] COMPLIANCE RECORDS (MEDICAL HARSHIPS AND TRANSFER FORMS).	6	6						
<b>1.1.019</b>	ATH06	PUBLIC RELATION RECORDS, NEWS, PRESS RELEASES, OR ANY PUBLIC RELATIONS FILES MAINTAINED OR ISSUED BY AN AGENCY, INCLUDES PRINT, ELECTRONIC, AUDIO, AND AUDIOVISUAL RECORDS	PM	PM	O					
	ATH07	RULES AND REGULATIONS (INCLUDING NCAA RULES, INTERPRETATION RECORDS AND/ OR FILES AND DOCUMENTATION TO SUBSTANTIATE THE DISSEMINATION AND COMMUNICATION OF RULES AND EDUCATIONAL MATERIAL	6	6		Subject to NCAA review.				

Retention Codes (Field 7)	Archival Codes (Field 8)
AC-After Closed, Terminated, Completed, Expired, Settled AV-Administrative Value	I- Transfer to 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	



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	ATH08	DAILY INJURY REPORT	7	7				
<b>1.1.067</b>	ATH09	NCAA PROVISIONAL COMPLIANCE REPORTS (INCLUDING INSTITUTIONAL SELF-STUDY AND THIRD YEAR PROVISIONAL REPORT)	PM	PM	O	Subject to NCAA review.		
<b>1.1.067</b>	ATH10	YEARLY REPORTS (INCLUDING EQUITY IN ATHLETICS DISCLOSURE ACT, GRADUATION RATES, AND US NEWS AND WORLD REPORT)	PM	PM	O	Subject to NCAA and federal agency review.		
<b>4.5.005</b>	ATH12	EXTERNAL FISCAL REPORTS (NCAA FINANCIAL AID REPORT)	FE+6	FE+6				
	ATH13	TEAM ROSTERS AND PHOTOGRAPHS (INCLUDING PHOTOGRAPHIC DOCUMENTATION OF ATHLETIC EVENTS)	PM	PM	I			
	ATH14	MEDICAL RECORDS	AC+7	AC+7		AC=Date of Graduation or Withdrawal		

<b>Retention Codes (Field 7)</b> 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	<b>Archival Codes (Field 8)</b> I- Transfer to University Archives O- Review by University Archivist
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	ATH15	RECRUITMENT MATERIALS	AC+5		AC+5	AC=END OF ELIGIBILITY				
<b>1.1.019</b>	ATH16	MEDIA GUIDES FOR INDIVIDUAL SPORTS	PM		PM	O				
	ATH17	SPORTS STATISTICS	PM		PM					
	ATH18	ISSG - INSTITUTIONAL SELF STUDY GUIDE	PM		PM	Part of the permanent membership obligations for NCAA members.				
	HPC01	PATRIOT CENTER MEMBER APPLICATIONS	FE+3		FE+3					
	QIA1.1	IPEDS [INTEGRATED POSTSECONDARY EDUCATIONAL DATA SYSTEM] REPORTS	AC+6		AC+6	AC=End of award year.				

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OSR1.1		SPONSORED GRANTS AND CONTRACTS	AC+7	AC+7	AC=After expiration of agreement.		
OSR1.2		INDIRECT COST CALCULATIONS	AC+5	AC+5	AC=After expiration of agreement.		
OSR1.3		TIME AND EFFORT REPORTS	AC+5	AC+5	AC=After expiration of agreement.		
SBS1.1		RECORDS OF STUDENTS ACCOUNTS - BILLS, PAYMENTS, REFUNDS	AC+5	AC+5	AC=End of award year.		
SH1.1		ACTIVE FILES - BASIC INFORMATION (FILES INCLUDE: HOUSING APPLICATION, CORRESPONDENCE, DEPOSIT RECEIPTS, AND ON-CAMPUS HOUSING CONTRACT)	AC+4	AC+4	AC=after end of lease.		
SH1.2		INACTIVE FILES - BASIC INFORMATION (FILES INCLUDE: HOUSING APPLICATION ONLY)	AC+1	AC+1	AC=Date of application.		

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	SH1.3	TRANSFER FILES (FILES INCLUDE: HOUSING APPLICATION, CORRESPONDENCE, DEPOSIT RECEIPTS, ON-CAMPUS HOUSING CONTRACT, AND CHECKOUT/ ROOM CONDITION FORMS)	AC+1	AC+1	AC=Date of application.
	SH1.4	PARKING APPEALS (tickets, appeal forms, rulings)	AC+2	AC+2	AC=After final disposition.
	SH2.1	JUDICIAL/DISCIPLINE RETENTION RECORDS (FILES INCLUDE: INCIDENT REPORTS, CORRESPONDENCE, JUDICIAL MEETING NOTES, SANCTION INFORMATION, WITNESS STATEMENTS, AND EVIDENCE)	AC+7	AC+7	AC=Date of Graduation.
<b>1.1.008</b>	SR9.1.001	ACCEPTANCE LETTERS	AC+3	AC+3	AC=After application term.
	SR9.1.002	ADVANCED PLACEMENT RECORDS	AC+3	AC+3	AC=Termination of enrollment.
	SR9.1.003	ADMISSIONS APPLICATIONS-(FERPA applies but records are subject to Open Records Law)	AC+3	AC+3	AC=After application term.

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SR9.1.005		ENTRANCE EXAMINATION REPORTS (ACT/CEEB)	AC+3	AC+3		AC=After application term.		
SR9.1.006		RECOMMENDATION LETTERS	AC+3	AC+3		AC=After application term.		
SR9.1.007		MEDICAL RECORDS SUBMITTED TO U.T. TYLER AS PART OF APPLICATION PROCESS AND NOT GENERATED AT THE INSTITUTION	AC+3	AC+3		AC=After application term.		
SR9.1.008		PLACEMENT TEST SCORES & REPORTS	AC+3	AC+3		AC=After application term.		
SR9.1.009		READMISSION SCORES	AC+3	AC+3		AC=After application term.		
SR9.1.010		RECRUITMENT MATERIALS	AC+3	AC+3		AC=After application term.		

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			<b>Agency Storage Total</b>							

SR9.1.011		OTHER TEST SCORES	AC+3	AC+3	AC=After application term.					
SR9.1.012		TRANSCRIPTS - OTHER COLLEGES	AC+3	AC+3	AC=After application term.					
SR9.1.013		TRANSCRIPTS - HIGH SCHOOLS	AC+3	AC+3	AC=After application term.					
SR9.1.014		MILITARY DOCUMENTS	AC+3	AC+3	AC=After application term.					
SR9.1.015		INTERNATIONAL STUDENT IMMIGRATION DOCUMENTATION	AC+3	AC+3	AC=After application term.					
SR9.1.016		TRANSCRIPTS, TEST SCORES, SUPPORTING DOCUMENTATION OF INDIVIDUALS WHO DO NOT APPLY	AC+1	AC+1	AC=receipt.					

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SR9.2.014		ACCEPTANCE LETTERS	AC+5	AC+5		AC=Graduation date or last attendance.				
SR9.2.015		ADVANCED PLACEMENT RECORDS	PM	PM						
SR9.2.016		APPLICATIONS FOR ADMISSIONS AND READMISSIONS	PM	PM						
SR9.2.018		ENTRANCE EXAMINATION REPORTS (ACT, CEEB)	PM	PM						
SR9.2.019		RECOMMENDATION LETTERS	AC	AC		AC=Until admitted. See Note 2 of supplemental notes.				
SR9.2.020		MEDICAL RECORDS SUBMITTED TO U.T. TYLER AS PART OF APPLICATION	AC+5	AC+5		AC=Graduation date or last attendance.				

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SR9.2.021		PLACEMENT SCORES	AC+5	AC+5		AC=Graduation date or last attendance.		
SR9.2.022		RECRUITMENT MATERIALS - BROCHURES, VIEWBOOK, COLLEGE PLANNERS, FACTBOOK	AC+2	AC+2		AC=End of semester distributed.		
SR9.2.023		RESIDENCY CLASSIFICATION FORMS	AC+5	AC+5		AC=Graduation date or last attendance.		
SR9.2.024		STUDENTS WAIVERS FOR RIGHTS OF ACCESS TO LETTERS OF RECOMMENDATION FOR ADMISSION	AC	AC		AC=Date of admission. See Note 2 of Supplemental Notes.		
SR9.2.025		OTHER TEST SCORES	PM	PM				
SR9.2.026		TRANSCRIPTS - HIGH SCHOOLS	PM	PM				

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SR9.2.027		TRANSCRIPTS - OTHER COLLEGES	PM                      PM					
SR9.2.028		INTERNATIONAL STUDENT IMMIGRATION DOCUMENTS	PW/AC+3    PW/AC+3			AC=Last date of attendance. PM=Permanent for International students on visas.		
SR9.2.029		ACADEMIC ACTION AUTHORIZATIONS,	AC+5                      AC+5			AC=Graduation date or last attendance for exchange visitor visas.		
SR9.2.023		MILITARY DOCUMENTS	PM                      PM					
SR9.3.030		ACADEMIC ADVISING DOCUMENTS	AC+5                      AC+5			AC=Graduation date or last attendance.		
SR9.3.031		ACADEMIC RECORDS-NARRATIVE EVALUATIONS, ASSESSMENTS	PM                      PM			See note 6, supplemental notes to Student Records.		

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SR9.3.032		ADVANCED PLACEMENT RECORDS	PM	PM	See note 6, supplemental notes to Student Records.					
SR9.3.033		APPLICATIONS FOR GRADUATION	PM	PM	AC=Graduation date or last attendance.					
SR9.3.034		APPLICATIONS FOR ADMISSIONS READMISSION	PM	PM	See note 6, supplemental notes to Student Records.					
SR9.3.035		AUDIT AUTHORIZATIONS-STUDENT RECORDS	AC+5	AC+5	AC=Graduation date or last attendance.					
SR9.3.036		CHANGES OF COURSE (ADD/DROP)	AC+5	AC+5	AC=End of academic term.					
SR9.3.037		CHANGES OF GRADE FORMS UPDATED DOCUMENTS	PM	PM						

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		CLASS LISTS - ORIGINAL GRADE SHEET	PM	PM						
		CLASS SCHEDULES-STUDENTS CHANGES OF COURSE ADDS/DROPS	AC+5	AC+5	AC=End of academic term.					
<b>1.1.008</b>		CORRESPONDENCE, GENERAL (INCOMING/ OUTGOING LETTERS, TO STUDENTS OR TO UNIVERSITIES -GENERAL INQUIRIES AND REQUESTS)	AC+5	AC+5	AC=Graduation date or last attendance.					
		CREDIT BY EXAMINATION FORMS	PM	PM	See note 6, supplemental notes to Student Records.					
		CURRICULUM CHANGE AUTHORIZATION	PM	PM	See note 6, supplemental notes to Student Records.					
		DISCIPLINARY ACTION DOCUMENTS (RESULTING IN A PENALTY OF SUSPENSION, EXPULSION, DENIAL OR REVOCATION OF A DEGREE, AND/ OR WITHDRAWAL OF A DIPLOMA)	PM	PM	See regents rules and reg. part one, chapter VI, section 3.8. The university shall maintain a permanent written disciplinary record for every student assessed a penalty of suspension, expulsion, denial or revocation of a degree, and/ or withdrawal of a diploma.					

Retention Codes (Field 7)	Archival Codes (Field 8)
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SR9.3.045a		DISCIPLINARY ACTION DOCUMENTS (NOT RESULTING IN A PENALTY OF SUSPENSION, EXPULSION, DENIAL OR REVOCATION OF A DEGREE, AND/ OR WITHDRAWAL OF A DIPLOMA)	AC+5	AC+5	AC=After disciplinary action date. See regents rules and reg. part one, chapter VI, section 3.8. A record of scholastic violations shall be maintained for at least five years.		
SR9.3.046		FEE ASSESSMENT FORMS	AC+5	AC+5	AC=Graduation date or last attendance.		
SR9.3.047		FERPA (FAMILY EDUCATIONAL RIGHTS AND PRIVACY ACT) DOCUMENTS	AC+5	AC+5	AC=Graduation date or last attendance. See note 3, supplemental notes to student records, section 9.3.		
SR9.3.048		FINANCIAL AID DOCUMENTS	AC+5	AC+5	AC=After annual audit has been accepted by U.S. Dept. of Educ.		
SR9.3.049		FOREIGN STUDENT FORMS	PM	PM			
SR9.3.051		GRADUATION LISTS	PM	PM			

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SR9.3.052		GRADUATION AUTHORIZATIONS	PM	PM						
SR9.3.053		HOLD OR ENCUMBRANCE AUTHORIZATIONS	AC	AC		AC=Until release.				
SR9.3.054		MEDICAL RECORDS	AC+5	AC+5		AC=Graduation date or last attendance.				
SR9.3.055		NAME CHANGE AUTHORIZATIONS	PM	PM		See note 6, supplemental notes to Student Records.				
SR9.3.056		PASS/ FAIL REQUESTS (STUDENTS)	AC+5	AC+5		AC=Graduation or date of last attendance. See note 6, supplemental notes to Student Records.				
SR9.3.057		PERSONAL DATA INFORMATION FORMS	PM	PM						

<b>Retention Codes (Field 7)</b> 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	<b>Archival Codes (Field 8)</b> I- Transfer to University Archives O- Review by University Archivist
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# STATE OF TEXAS Records Retention Schedule

SLR 105  
Form SLR 105C must  
accompany this form.

2. Agency Code	<b>750</b>	3. THE UNIVERSITY OF TEXAS AT TYLER								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period	8. Archival	9. Remarks	10. 106 No.	11. TSLAC USE ONLY			
			<b>Agency Storage Total</b>							

<b>4.2.002</b>	SR9.3.059	TRANSCRIPT REQUESTS & RECEIPTS	AC+1	AC+1	AC=End of academic term.					
	SR9.3.060	TRANSFER CREDIT EVALUATIONS	PM	PM	See note 6, supplemental notes to Student Records.					
	SR9.3.061	TUITION AND FEE CHARGES	AC+5	AC+5	AC=Graduation date or last attendance.					
	SR9.3.062	WITHDRAWAL AUTHORIZATIONS	PM	PM	See note 6, supplemental notes to Student Records.					
<b>1.3.001</b>	SR9.3.068	CATALOGS	PM	PM	The archival requirement is met by sending the required copies of the requests to the Texas State Publications Depository Program, Texas State Library and Archives Commission.					
	SR9.3.069	COMMENCEMENT PROGRAM	PM	PM		See note 6, supplemental notes to Student Records.				

Retention Codes (Field 7)	Archival Codes (Field 8)
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	I- Transfer to University Archives O- Review by University Archivist



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<b>2. Agency Code</b>	<b>750</b>	<b>3. THE UNIVERSITY OF TEXAS AT TYLER</b>								
<b>4. Records Series Item No.</b>	<b>5. Agency Item No.</b>	<b>6. Record Series Title</b>	<b>7. Retention Period Agency Storage Total</b>		<b>8. Archival</b>	<b>9. Remarks</b>	<b>10. 106 No.</b>	<b>11. TSLAC USE ONLY</b>		

SR9.3.070		DEGREE STATISTICS	PM	PM	See note 6, supplemental notes to Student Records.		
SR9.3.071		ENROLLMENT STATISTICS	PM	PM	See note 6, supplemental notes to Student Records.		
SR9.3.072		GRADE STATISTICS	PM	PM	See note 6, supplemental notes to Student Records.		
SR9.3.073		RACE/ETHNICITY STATISTICS	PM	PM	See note 6, supplemental notes to Student Records.		
SR9.3.074		SCHEDULE OF CLASSES/ (INSTITUTIONAL)	PM	PM	See note 6, supplemental notes to Student Records.		
SR9.3.304		ADDRESS CHANGE FORMS	PM	PM			

<b>Retention Codes (Field 7)</b> 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	<b>Archival Codes (Field 8)</b> I- Transfer to University Archives O- Review by University Archivist
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2. Agency Code	<b>750</b>	3. THE UNIVERSITY OF TEXAS AT TYLER								
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SR9.3.305		CAREER PLACEMENT FILES	AC+5	AC+5		AC=Graduation date or last attendance.				
SR9.3.306		DISABILITY SUPPORT	AC+5	AC+5		AC=Graduation date or last attendance.				
SR9.3.307		MILITARY DOCUMENTS	PM	PM						
SR9.3.308		STUDENT COUNSELING RECORDS - CORE CURRICULUM EVALUATIONS USED FOR ADMISSION DECISIONS	AC+5	AC+5		AC=Graduation date or last attendance.				
SR9.3.316		DUPLICATE RECORDS (Registrar keeps permanent copy - below is for copies kept by others) INACTIVE STUDENT	AC+2	AC+2		AC=Last attendance date.				
SR9.3.316a		DUPLICATE RECORDS (Registrar keeps permanent copy - below is for copies kept by others) GRADUATED STUDENT	AC+1	AC+1		AC=Graduation or last attendance.				

<b>Retention Codes (Field 7)</b> 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	<b>Archival Codes (Field 8)</b> I- Transfer to University Archives O- Review by University Archivist
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# STATE OF TEXAS Records Retention Schedule

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4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period	<b>Agency Storage Total</b>	8. Archival	9. Remarks	10. 106 No.	11. TSLAC USE ONLY		

SR9.3.317		FRESHMAN ADVISING FILES	AC+5	AC+5		AC=After first attendance date.				
SR9.4.063		ENROLLMENT VERIFICATIONS	AC+1	AC+1		AC=After date submitted.				
SR9.4.064		FINANCIAL AID ASSISTANCE RECORDS	AC+5	AC+5		AC=Graduation date or last attendance.				
SR9.4.065		SOCIAL SECURITY CERTIFICATIONS	AC+1	AC+1		AC=After date submitted.				
SR9.4.066		TEACHER CERTIFICATIONS	PM	PM		See note 6, supplemental notes to Student Records.				
SR9.4.067		VETERANS STUDENTS CERTIFICATION - VETERANS ADMINISTRATION EDUCATIONAL ASSISTANCE ALLOWANCES	AC+3	AC+3		AC=Graduation date or last attendance.				

<b>Retention Codes (Field 7)</b> 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	<b>Archival Codes (Field 8)</b> I- Transfer to University Archives O- Review by University Archivist
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SR9.5.075		REQUESTS FOR FORMAL HEARINGS - ACADEMIC	PM		PM	See note 6, supplemental notes to Student Records.				
SR9.5.076		REQUESTS FOR FORMAL HEARINGS - STUDENT	PM		PM	See note 6, supplemental notes to Student Records.				
SR9.5.077		REQUESTS AND DISCLOSURES OF PERSONAL IDENTIFIABLE INFORMATION	PM		PM	See note 6, supplemental notes to Student Records.				
SR9.5.078		STUDENTS REQUESTS FOR NONDISCLOSURE OF DIRECTORY INFORMATION	PM		PM	See note 6, supplemental notes to Student Records.				
SR9.5.079		STUDENT STATEMENTS ON CONTENT OF RECORDS REGARDING HEARING PANEL DECISIONS - ACADEMIC	PM		PM	See note 6, supplemental notes to Student Records.				
SR9.5.080		STUDENT STATEMENTS ON CONTENT OF RECORDS REGARDING HEARING PANEL DECISIONS - STUDENT	PM		PM	See note 6, supplemental notes to Student Records.				

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2. Agency Code <b>750</b>	3. THE UNIVERSITY OF TEXAS AT TYLER									
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period <b>Agency Storage Total</b>		8. Archival	9. Remarks	10. 106 No.	11. TSLAC USE ONLY		

SR9.5.081		STUDENT'S WRITTEN CONSENT FOR RECORD DISCLOSURE	PM	PM				
SR9.5.082		WAIVERS FOR RIGHTS OF ACCESS	PM	PM	See note 6, supplemental notes to Student Records.			
SR9.5.083		WRITTEN DECISIONS OF HEARING PANELS	PM	PM	See note 6, supplemental notes to Student Records.			
SR9.5.509		SUBPOENA REQUESTS	PM	PM				
SR9.5.510		SUBPOENA REQUESTS WITH COURT ORDER FOR NON-DISCLOSURE	PM	PM				
SR9.6.002		SRK [STUDENT RIGHT-TO-KNOW ACT] GRADUATION/ COMPLETION, TRANSFER-OUT DATA	PM	PM				

<b>Retention Codes (Field 7)</b> 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	<b>Archival Codes (Field 8)</b> I- Transfer to University Archives O- Review by University Archivist
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4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period <b>Agency Storage Total</b>	8. Archival	9. Remarks	10. 106 No.	11. TSLAC USE ONLY			

	SR9.6.003	ATHLETIC PARTICIPATION/ EADA [EQUITY IN ATHLETICS ANALYSIS] DOCUMENTS	AC+5	AC+5				AC=Date of required disclosure.		
<b>1.1.070</b>	SR9.6.004	INSTITUTIONAL INFORMATION - WITHDRAWAL POLICIES AND PROCEDURES	AC+3	AC+3	O			AC=Completion or termination of rules, policies, or procedures.		
	SR9.7.084	PROGRAM PARTICIPATION AGREEMENT	AC+5	AC+5				AC=End of award year.		
<b>1.1.067</b>	SR9.7.086	REPORTS TO STATE AGENCIES	AC+5	AC+5	O			AC=End of award year.		
	SR9.7.087	AUDIT AND REVIEW REPORTS - FINANCIAL AID OFFICE'S COPY	AC+5	AC+5				AC=End of award year. Note: The official copy of internal and external audit reports are kept by the Office of Audit Services under 1.1.002 for 7 years.		
	SR9.7.088	SELF-EVALUATION REPORTS - PEER REVIEWS OR SELF-EVALUATION TOOLS	AC+5	AC+5				AC=End of award year.		

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	
AV-Administrative Value	FE-Fiscal Year End	MO-Months	US-Until Superseded	I- Transfer to University Archives O- Review by University Archivist



# STATE OF TEXAS Records Retention Schedule

SLR 105  
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2. Agency Code <b>750</b>	3. THE UNIVERSITY OF TEXAS AT TYLER									
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period Agency Storage Total		8. Archival	9. Remarks	10. 106 No.	11. TSLAC USE ONLY		

<b>4.5</b>	SR9.7.089	OTHER REPORTS PERTAINING TO FINANCIAL RESPONSIBILITY AND STANDARDS OF ADMINISTRATIVE CAPABILITY	AC+5	AC+5	AC=End of award year.
	SR9.7.090	RECORDS OF SFA [STUDENT FINANCIAL AID] PROGRAM TRANSACTIONS	AC+5	AC+5	AC=End of award year.
<b>4.7.002</b>	SR9.7.091	BANK STATEMENTS FOR ACCOUNTS CONTAINING SFA [STUDENT FINANCIAL AID] FUNDS	AC+5	AC+5	AC=End of award year.
<b>4.4.001</b>	SR9.7.093	LEDGERS IDENTIFYING SFA TRANSACTIONS	AC+5	AC+5	AC=End of award year.
<b>4.5.001</b>	SR9.7.094	RECORDS SUPPORTING DATA ON REQUIRED REPORTS, (program reconciliations, audit reports, school responses, pell grant statements, accrediting and licensing agency reports)	AC+5	AC+5	AC=End of award year.
	SR9.7.095	FEDERAL WORK - STUDY PAYROLL RECORDS	AC+5	AC+5	AC=End of award year.

Retention Codes (Field 7)  AC-After Closed, Terminated, Completed, Expired, Settled AV-Administrative Value CE-Calendar Year End FE-Fiscal Year End LA-Life of Asset MO-Months PM-Permanent US-Until Superseded	Archival Codes (Field 8)  I- Transfer to University Archives O- Review by University Archivist
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SR9.7.096		SAR [STUDENT AID REPORT]/ ISIR [INSTITUTIONAL STUDENT INFORMATION REPORT]	AC+5	AC+5	AC=End of award year.					
SR9.7.098		DOCUMENTATION OF STUDENT ELIGIBILITY	AC+5	AC+5	AC=End of award year.					
SR9.7.099		FINANCIAL AID HISTORY FOR TRANSFER STUDENT	AC+5	AC+5	AC=End of award year.					
SR9.7.100		DOCUMENTATION OF STUDENT'S SATISFACTORY ACADEMIC PROGRESS	AC+5	AC+5	AC=End of award year.					
SR9.7.101		DOCUMENTATION OF STUDENT'S PROGRAM OF STUDY AND COURSES ENROLLED IN	AC+5	AC+5	AC=End of award year.					
SR9.7.102		DATA USED TO ESTABLISH STUDENT'S ADMISSION, ENROLLMENT AND STATUS	AC+5	AC+5	AC=End of award year.					

<b>Retention Codes (Field 7)</b> 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	<b>Archival Codes (Field 8)</b> I- Transfer to University Archives O- Review by University Archivist
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2. Agency Code	<b>750</b>	3. THE UNIVERSITY OF TEXAS AT TYLER								
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SR9.7.103		DOCUMENTS USED TO VERIFY APPLICANT'S DATA	AC+5	AC+5	AC=End of award year.		
SR9.7.104		DOCUMENTATION RELATING TO RECEIPT OF AID	AC+5	AC+5	AC=End of award year.		
SR9.7.105		DATE AND AMOUNT OF DISBURSEMENTS	AC+5	AC+5	AC=End of award year.		
SR9.7.106		DOCUMENTATION OF INITIAL OR EXIT LOAN COUNSELING	AC+5	AC+5	AC=End of award year.		
SR9.7.108		CAMPUS-BASED AID (PERKINS LOAN, SEOG [SUPPLEMENTAL EDUCATIONAL OPPORTUNITY GRANT] AND FEDERAL WORKSTUDY)	AC+5	AC+5	AC=End of award year.		
SR9.7.109		PELL GRANT	AC+5	AC+5	AC=End of award year.		

<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          LA-Life of Asset          MO-Months          PM-Permanent          US-Until Superseded</p>	<p>Archival Codes (Field 8)</p> <p>I- Transfer to University Archives          O- Review by University Archivist</p>
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and Archives 2. Agency Code	<b>750</b>	3. THE UNIVERSITY OF TEXAS AT TYLER								
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SR9.7.110		FISAP [FISCAL OPERATIONS REPORT AND APPLICATION TO PARTICIPATE]	AC+5	AC+5	AC=End of award year.					
SR9.7.111		PERKINS REPAYMENT RECORDS	AC+5	AC+5	AC=End of award year.					
SR9.7.112		PERKINS ORIGINAL PROMISSORY NOTES	AC	AC	AC = Until loan is satisfied, then as long as administratively valuable.					
SR9.7.113		FFEL [FEDERAL FAMILY EDUCATION LOAN & DIRECT LOANS]: BORROWER'S ELIGIBILITY RECORDS	AC+5	AC+5	AC= End of award year student last attended.					
SR9.7.114		ALL OTHER RECORDS/REPORTS	AC+5	AC+5	AC= End of award year report.					
SR9.7.115		REPORT AND FORMS USED FOR PARTICIPATION IN THE SFA PROGRAM	AC+5	AC+5	AC=End of award year.					

<b>Retention Codes (Field 7)</b> 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	<b>Archival Codes (Field 8)</b> I- Transfer to University Archives O- Review by University Archivist
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	SR9.7.116	APPLICATON DATA SUBMITTED TO THE DEPT OF ED OR LENDER	AC+5	AC+5	AC=End of award year.					
	SSCI.1	STUDENT COUNSELING RECORDS	AC+10	AC+10	AC=Date of last consultation. For patients less than 18 years of age when last treated, the records must be kept at least until the patient's 21 <sup>st</sup> birthday or 7 years after the date that the patient was last treated, whichever is later.					
	UP6.1.001	POLICE CASE REPORTS	PM	PM						
<b>5.4.013</b>	UP6.1.002	POLICE DISASTER RECOVERY PLAN	US	US						
	UP6.1.003	POLICE INCIDENT REPORTS	3	3						
	UP6.1.004	POLICE OFFENSE REPORTS	AC	AC		AC=Statute of Limitations.Refer to PS4125-05, Offense Investigation Records, Local Schedule PS, Records Common to Public Safety Agencies, 3 <sup>rd</sup> ed. Archival Codes (Field 8)				

Retention Codes (Field 7)	I- Transfer to University Archives O- Review by University Archivist
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	



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		UP6.1.005 POLICE PERSONNEL BACKGROUND INFO	3	3						
<b>3.3.024</b>		UP6.1.006 POLICE POLICY AND PROCEDURE MANUAL	US+5	US+5						
		UP6.1.007 PARKING CITATIONS	AC+2	AC+2	AC=After final disposition (paid, voided, etc.).					
		UP6.1.008 CLERY REPORTS – Police/Security Reports, Judicial records	AC+7	AC+7	AC=Date of required disclosure.					
<b>1.1</b>		ADM1.1 ACCREDITATION STUDIES	US+5	US+5	Record Copy Only.					
<b>1.1</b>		ADM1.1a ACCREDITING & LICENSING AGENCY REVIEW, APPROVALS, AND REPORTS	PM	PM						

<b>Retention Codes (Field 7)</b> 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	<b>Archival Codes (Field 8)</b> I- Transfer to University Archives O- Review by University Archivist
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<b>1.1</b>	ADM1.1b	ACCREDITATION WORKING PAPERS	AC+10	AC+10	AC=Date of certification of accreditation.
<b>1.1</b>	ADM1.1c	DEEDS AND RELATED DOCUMENTS	LA	LA	
<b>1.1</b>	ADM1.1d	DEGREE PROPOSALS	PM	PM	
<b>1.1</b>	ADM1.1e	GIFT RECORDS	PM	PM	Security is open with restrictions.
<b>1.1</b>	ADM1.1f	PATENTS, TRADEMARKS COPYRIGHTS AND DOCUMENTATION (Research records, reflecting usage and like)	AC+20	AC+20	AC=Term of agreement, copyright, trademark, or patent includes underlying patents, trademarks and copyrights. 3U.S.C./SEC.15
<b>1.1.002</b>	ADM1.1.002	INTERNAL AUDIT REPORT	AC+7	AC+7	AC=Publication or release of final audit findings. To be maintained by Internal Audit Office of Institution.

Retention Codes (Field 7)

Archival Codes (Field 8)

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	I- Transfer to University Archives O- Review by University Archivist
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<b>1.1.002</b>	ADM1.1.002a	INTERNAL AUDIT WORKING PAPERS	AC+7	AC+7	AC=Publication or release of final audit findings. To be maintained by Internal Audit Office of Institution.					
<b>1.1.002</b>	ADM1.1.002b	EXTERNAL AUDITS	AC+7	AC+7	AC=Publication or release of final audit findings. The record copy of any audit performed by the State of Texas Auditors Office is retained permanently by that office.					
<b>1.1.004</b>	ADM1.1.004	LEGISLATIVE BUDGET REQUEST (Record Copy)	AC+6	AC+6	I Record Copy Only AC=Passage of Act. ARCHIVAL NOTE: The archive requirement is met by UT System sending the required copies of the requests to 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.					
<b>1.1.006</b>	ADM1.1.006	COMPLAINT RECORDS (PUBLIC)	AC+2	AC+2	AC=Final disposition of the complaint.					
<b>1.1.007</b>	ADM1.1.007	CORRESPONDENCE, ADMIN. (INCOMING/ OUTGOING LETTERS	4	4	O Evaluate for archival value after 4 years. Caution: only for correspondence that is not included in another series in this schedule.					

<b>Retention Codes (Field 7)</b> 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	<b>Archival Codes (Field 8)</b> I- Transfer to University Archives O- Review by University Archivist
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<b>1.1.008</b>	ADM1.1.008	CORRESPONDENCE, GENERAL (INCOMING/ OUTGOING LETTERS, GENERAL INQUIRIES AND REQUESTS)	2	2	Caution: Only for correspondence that is not included in another series in this schedule.					
<b>1.1.010</b>	ADM1.1.010	DIRECTIVES	US+1	US+1						
<b>1.1.011</b>	ADM1.1.011	EXECUTIVE ORDERS	US+3	US+3	I	US=Until Superseded.				
<b>1.1.013</b>	ADM1.1.013	CALENDARS/APPOINTMENT AND ITINERARY RECORDS	CE+1	CE+1	O	<b>ARCHIVES NOTE:</b> Only the calendars, appointment, and itinerary records of elected officials, executive staff, board or commission members, division directors, and program heads require archival review. Contact the University Archives when these records have met their retention periods.				
<b>1.1.014</b>	ADM1.1.014	LEGAL OPINIONS AND ADVICE	AV	AV	O					
<b>1.1.019</b>	ADM1.1.019	PUBLIC RELATIONS RECORDS	2	2	O					

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

SLR 105  
Form SLR 105C must  
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2. Agency Code	<b>750</b>	3. THE UNIVERSITY OF TEXAS AT TYLER								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period <b>Agency Storage Total</b>	8. Archival	9. Remarks	10. 106 No.	11. TSLAC USE ONLY			

<b>1.1.020</b>	ADM1.1.020	PUBLIC INFORMATION REQUESTS - NOT EXEMPT Includes all correspondence and documentation relating to request for records that are furnished to the public under Public Information Act. (Chapter 552, Government Code)	AC+1	AC+1	AC=Date request fulfilled.					
<b>1.1.021</b>	ADM1.1.021	PUBLIC INFORMATION REQUESTS - EXEMPTED Includes all correspondence and documentation relating to requests for records that are exempt under the Public Information Act (Chapter 552, Government Code.)	AC+2	AC+2	AC=Date of notification that records are exempt.					
<b>1.1.023</b>	ADM1.1.023	ORGANIZATIONAL CHARTS	US	US I						
<b>1.1.024</b>	ADM1.1.024	PLANS AND PLANNING RECORDS	AC+3	AC+3	O AC=Decision made to implement or not to implement result of planning process.					
<b>1.1.040</b>	ADM1.1.040	SPEECHES AND PAPERS (AGENCY WORK RELATED)	AC	AC	O AC=End of term of office or termination of service in a state position.					
<b>1.1.041</b>	ADM1.1.041	SUGGESTION SYSTEM RECORDS	1	1						

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

<b>1.1.043</b>	ADM1.1.043	TRAINING MATERIALS	US+1	US+1						
<b>1.1.048</b>	ADM1.1.048	LITIGATION FILES	AC+20	AC+20	O	AC=As applicable, decision of the university not to file a lawsuit or decision that a lawsuit will not be filed against the university 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.				
<b>1.1.053</b>	ADM1.1.053	REGISTRATION LOGS	AC	AC	AC=Report filed with the Texas Ethics Commission.					
<b>1.1.055</b>	ADM1.1.055	STRATEGIC PLANS (RECORD COPY)	PM	PM	I	Record Copy Only. 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.				
<b>1.1.056</b>	ADM1.1.056	ADA DOCUMENTATION (AMERICANS WITH DISABILITIES ACT)	3	3	28 CFR 35.105(C).					

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<b>1.1.057</b>	ADM1.1.057	TRANSITORY INFORMATION	AC	AC	AC=Purpose of record has been fulfilled. Records of temporary usefulness that are not an integral part of a records series of an agency, that are not regularly filed within an agency's recordkeeping system, and that are required only for a limited period of time for the completion of an action by an official or employee of the agency or in the preparation of an on-going records series. Transitory records 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.
<b>1.1.059</b>	ADM1.1.059	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.
<b>1.1.063</b>	ADM1.1.063	STAFF MEETING MINUTES AND NOTES	1	1	

Retention Codes (Field 7) AC-After Closed, Terminated, Completed, Expired, Settled AV-Administrative Value CE-Calendar Year End FE-Fiscal Year End LA-Life of Asset MO-Months PM-Permanent US-Until Superseded	Archival Codes (Field 8) I- Transfer to University Archives O- Review by University Archivist
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<b>1.1.064</b>	ADM1.1.064	AGENCY PERFORMANCE MEASURES DOCUMENTATION	FE+3	FE+3						
<b>1.1.065</b>	ADM1.1.065	REPORTS AND STUDIES (NON-FISCAL)-RAW DATA	AV	AV	CAUTION: Does not include source documentation used for information or data included in or directly related to another record series in the schedule. SEE especially item number 1.1.064.					
<b>1.1.066</b>	ADM1.1.066	REPORTS-BIENNIAL OR ANNUAL AGENCY (NARRATIVE)	AC+6	AC+6	I	AC=Sept 1 of odd numbered years. ARCHIVES NOTE: The archival requirement is met by sending the required copies of the reports to the Texas State Publications Depository Program, Texas State Library and Archives Commission.				
<b>1.1.067</b>	ADM1.1.067	REPORTS AND STUDIES (NON-FISCAL)	3	3						
<b>1.1.068</b>	ADM1.1.068	REPORTS ON PERFORMANCE MEASURES	AC+6	AC+6		AC=September 1 of odd numbered years.				

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<b>1.1.069</b>	ADM1.1.069	ACTIVITY REPORTS - PERTAINING TO WORKLOAD MONITORING, TASK COMPLETIONS AND NUMBER OF CONTACTS, SIMILAR ACTIVITIES	1	1				
<b>1.1.070</b>	ADM1.1.070	AGENCY RULES, POLICIES, AND PROCEDURES - FINAL BOARD OF REGENTS RULES AND REGULATIONS	AC+3	AC+3	O	AC=Completion or termination of program, rules, policies or procedures. SEE ALSO: Agency Rules, Policies and Procedures - Working Files, item number 1.1.071.		
<b>1.1.071</b>	ADM1.1.071	AGENCY RULES, POLIQUES, AND PROCEDURES-WORKING FILES	AC+3	AC+3	O	AC=Completion or termination of program, rules, or policies or procedures. See also item number 1.1.070.		
<b>1.1.072</b>	ADM1.1.072	PUBLIC INFORMATION REPORTS	2	2				
<b>1.2.001</b>	ADM1.2.001	DESTRUCTION AUTHORIZATIONS	FE+3	FE+3				
<b>1.2.003</b>	ADM1.2.003	FORMS HISTORY FILE	AC+1	AC+1		AC=Discontinuance of use of form.		

Archival Codes (Field 8)

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	I- Transfer to University Archives O- Review by University Archivist
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<b>1.2.004</b>	ADM1.2.004	FORMS INVENTORY	US US					
<b>1.2.005</b>	ADM1.2.005	RECORDS RETENTION SCHEDULE (SLR 105)	US US					
<b>1.2.006</b>	ADM1.2.006	RECORDS TRANSMITTAL FORMS	AC+2 AC+2			AC=Date of authorization for destruction, permanent transfer from storage by the records management officer.		
<b>1.2.008</b>	ADM1.2.008	REQUEST FOR AUTHORITY TO DISPOSE OF STATE RECORDS (RMD 102)	FE+3 FE+3			Original is retained by the State and Local Records Management Division, Texas State Library and Archives Commission.		
<b>1.2.010</b>	ADM1.2.010	RECORDS DISPOSITION LOGS	10 10					
<b>1.2.012</b>	ADM1.2.012	RECORDS INVENTORY WORKSHEETS	US US					

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<b>1.2.013</b>	ADM1.2.013	RECORDS CONTROL LOCATOR AIDS	AC	AC	AC=When control aid is updated, revised or no longer needed.					
<b>1.2.014</b>	ADM1.2.014	RECORDS MANAGEMENT PLANS	US+1	US+1						
<b>1.2.015</b>	ADM1.2.015	DISASTER RECOVERY SERVICE TRANSMITTALS (RMD 109)	FE+1	FE+1						
<b>1.2.016</b>	ADM1.2.016	DISASTER RECOVERY SERVICE APPROVAL FORM (RMD 113)	AC	AC	AC=Until superseded or termination of service.					

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<b>1.3.001</b>	ADM1.3.001	STATE PUBLICATIONS	AC+2	AC+2	AC=Until superseded or obsolete. CAUTION: Many state publications must be submitted to the Texas State Publications Depository Program, Texas State Library and Archives Commission, by law (Government Code 441.101-441.106). The Texas State Library and Archives Commission will retain a copy of all state publications submitted to it on a continuing basis, subject to periodic evaluation to determine if the publication merits further retention. For additional information and requirements concerning state publications made available to the public through the Internet, consult the administrative rules of the Texas State Publications Depository Program of the Texas State Library and Archives Commission (13 TAC 3.1-3.16).					
<b>1.3.002</b>	ADM1.3.002	PUBLICATIONS DEVELOPMENT FILES	AV	AV	O					
<b>2.1.001</b>	IR2.1.001	PROCESSING FILES	AC	AC	AC= Completion of 3 <sup>rd</sup> verification					

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<b>2.1.002</b>	IR2.1.002	MASTER FILES	AC	AC	AC=Completion of 3 <sup>rd</sup> verification					
<b>2.1.007</b>	IR2.1.007	SOFTWARE PROGRAMS	AC	AC	AC=Until electronic records are transferred to and made usable in a new software environment. 13 TAC 6.94.					
<b>2.1.008</b>	IR2.1.008	HARDWARE DOCUMENTATION	AC	AC	AC=Until electronic records are transferred to and made useable in a new hardware environment. 13 TAC 6.94.					
<b>2.1.009</b>	IR2.1.009	TECHNICAL DOCUMENTATION	AC	AC	AC=Until electronic records are transferred to and made useable in a new hardware environment. 13 TAC 6.94.					
<b>2.1.010</b>	IR2.1.010	AUDIT TRAIL RECORDS	AC	AC	AC=All audit requirements have been met.					
<b>2.1.011</b>	IR2.1.011	FINDING AIDS, INDEXES, AND TRACKING SYSTEMS	AC	AC	AC=The related records have been destroyed.					

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<b>2.2</b>	IR2.2.000	ELECTRONIC LEARNING SYSTEM RECORDS	AC+3	AC+3	AC=Completion of 3rd update cycle.		
<b>2.2.001</b>	IR2.2.001	SYSTEM MONITORING RECORDS	AV	AV			
<b>2.2.002</b>	IR2.2.002	CHARGEBACK RECORDS TO DATAPROCESSING SERVICE USERS	FE+3	FE+3			
<b>2.2.004</b>	IR2.2.004	COMPUTER JOB SCHEDULES	US+3MO	US+3MO			
<b>2.2.010</b>	IR2.2.010	DATA PROCESSING POLICIES AND PROCEDURES MANUAL	US+3	US+3			
<b>2.2.011</b>	IR2.2.011	BATCH DATA ENTRY CONTROL RECORDS	AC	AC	AC=When reconciliation confirmed.		

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<b>2.2.012</b>	IR2.2.012	OUTPUT RECORDS FOR COMPUTER PRODUCTION. ACCEPTED, REJECTED, & SUSPENDED TRANSACTIONS)	AV	AV						
<b>2.2.013</b>	IR2.2.013	QUALITY ASSURANCE	AC	AC	AC=No longer needed as an audit trail for modified records.					
<b>2.2.014</b>	IR2.2.014	INTERNET COOKIES	AV	AV	The disposal of Internet cookies need not be documented through destruction authorizations (1.2.001) or in records disposition logs (1.2.010), but agencies should establish procedures governing disposal of these records as part of its records management plan (1.2.014).					
<b>2.2.015</b>	IR2.2.015	HISTORY FILES - WEB SITES	AV	AV	The disposal of history files need not be documented through destruction authorizations (1.2.001) or in the records disposition logs (1.2.010), but agencies should establish procedures governing disposal of these records as part of its records management plan (1.2.014).					
<b>2.2.016</b>	IR2.2.016	SOFTWARE REGISTRATIONS, WARRANTIES AND LICENSE AGREEMENTS	LA+3	LA+3						

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<b>3.1</b>	HR3.1	CONFLICT OF INTEREST ACKNOWLEDGEMENT FORM	AC+50	AC+50	AC=Retirement Date. *See Supplemental Notes.					
<b>3.1.001</b>	HR3.1.001	APPLICATIONS OF EMPLOYEES (NOT HIRED)	2	2	29 CFR 1602.49(a).					
<b>3.1.002</b>	HR3.1.002	APPLICATIONS OF EMPLOYEES (HIRED)	AC+5	AC+5	AC=Termination of Employee.					
<b>3.1.006</b>	HR3.1.006	EMPLOYEE COUNSELING	AC+3	AC+3	AC=Termination of Counseling.					
<b>3.1.011</b>	HR3.1.011	EMPLOYEE INSURANCE FILE - SEPARATED EMPLOYEES	AC+5	AC+5	AC=Separation date.					
<b>3.1.011</b>	HR3.1.011a	EMPLOYEE INSURANCE FILE - RETIRED EMPLOYEES	AC+50	AC+50	AC=Retirement Date.					

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<b>3.1.012</b>	HR3.1.012	EMPLOYMENT OPPORTUNITY ANNOUNCEMENTS	2	2		29 CFR1602.49(a).				
<b>3.1.013</b>	HR3.1.013	EMPLOYMENT CONTRACTS	AC+5	AC+5		AC=Expiration or termination of the contract according to its terms.				
<b>3.1.014</b>	HR3.1.014	EMPLOYMENT SELECTION	2	2		29 CFR1602.49(A) (Does not include criminal history checks) See 3.1.026.				
<b>3.1.018</b>	HR3.1.018	GRIEVANCE RECORDS (AS PART OF EMPLOYEE FILE)	AC+5	AC+5		AC=Separation of employment. Note: does not include formal complaints filed by an employee with the Equal Employment Opportunity Office.				
<b>3.1.019</b>	HR3.1.019	PERFORMANCE APPRAISALS	AC+5	AC+5		AC=Separation of employment 29 CFR 1620.32(c).				
<b>3.1.020</b>	HR3.1.020	PERSONNEL CORRECTIVE ACTION DOCUMENTATION	AC+5	AC+5		AC=Separation of employment.				

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<b>3.1.021</b>	HR3.1.021	PERSONNEL DISCIPLINARY ACTION DOCUMENTATION	AC+5	AC+5	AC=Termination of employment.					
<b>3.1.022</b>	HR3.1.022	PERSONNEL INFORMATION	2	2	29 CFR 1620.49(a).					
<b>3.1.023</b>	HR3.1.023	POSITION/ JOB DESCRIPTIONS	AC+4	AC+4	AC=Until superseded or job eliminated.40 TAC 815.106(i)					
<b>3.1.024</b>	HR3.1.024	PHYSICAL EXAMINATIONS / MEDICAL REPORTS	AC+2	AC+2	AC=Until superseded or termination of employment.					
<b>3.1.026</b>	HR3.1.026	CRIMINAL HISTORY CHECKS	AC	AC	AC=The criminal history record has served the immediate purpose for which it was obtained.					
<b>3.1.027</b>	HR3.1.027	TRAINING AND EDUCATIONAL ACHIEVEMENT RECORDS (INDIVIDUAL)	AC+5	AC+5	AC=Termination of employment.					

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<b>3.1.029</b>	HR3.1.029	EMPLOYMENT ELIGIBILITY (Form INS I-9)	AC+1	AC+1	AC=Termination of Employment. <b>CAUTION:</b> Federal regulation requires that INS 1-9 forms be retained for 3 years from date of hire or 1 year after separation of the employee, whichever later. Agencies should make certain that the INS I-9 forms for employees who terminate from an agency less than 3 years from date of hire are kept for the 3 year retention period.					
<b>3.1.031</b>	HR3.1.031	EMPLOYEE BENEFITS (OTHER THAN INSURANCE)	AC+2	AC+2	AC=Until superseded or termination of employment.					
<b>3.1.034</b>	HR3.1.034	RESUMES (UNSOLICITED)	1	1						
<b>3.1.036</b>	HR3.1.036	APPRENTICESHIP RECORDS	5	5	29 CFR 30.8(e).					
<b>3.1.037</b>	HR3.1.037	EMPLOYEE RECOGNITION RECORDS OF AWARDS, TENURE	AC+5	AC+5	AC=Termination of Employment.					
<b>3.1.038</b>	HR3.1.038	PUBLIC ACCESS OPTION FORM	US	US	SEE item number 3.3.011.					

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4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period	8. Archival	9. Remarks	10. 106 No.	11. TSLAC USE ONLY			
			<b>Agency Storage Total</b>							

<b>3.1.039</b>	HR3.1.039	OMBUDSMAN RECORDS	AC	AC	AC=Final decision or matter closed. <b>CAUTION:</b> 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.					
<b>3.2.001</b>	PY3.2.001	EMPLOYEE DEDUCTION AUTHORIZATIONS	AC+4	AC+4	AC=After termination of employee or after amendment, expiration, or termination of authorization, whichever sooner.					
<b>3.2.002</b>	PY3.2.002	EMPLOYEE EARNINGS RECORDS	4	4	All audit requirements must be met 40 TAC 815.106(i).					
<b>3.2.003</b>	PY3.2.003	FEDERAL TAX RECORDS	AC+20	AC+20	AC=Tax due date, date filed or date tax is paid whichever is later. 26 CFR 31.6001-1(e)(2).					
<b>3.2.004</b>	PY3.2.004	INCOME ADJUSTMENT AUTHORIZATIONS	2	2	29 CFR 516.6(c).					
<b>3.2.005</b>	PY3.2.005	W-4 FORMS	AC+4	AC+4	AC=Until superseded, obsolete, or separation of employee. 26 CFR 31.6000-1 (e)(2).					

<b>Retention Codes (Field 7)</b> 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	<b>Archival Codes (Field 8)</b> I- Transfer to University Archives O- Review by University Archivist
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# STATE OF TEXAS Records Retention Schedule

SLR 105  
Form SLR 105C must  
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2. Agency Code	<b>750</b>	3. THE UNIVERSITY OF TEXAS AT TYLER								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period <b>Agency Storage Total</b>		8. Archival	9. Remarks	10. 106 No.	11. TSLAC USE ONLY		

<b>3.2.006</b>	PY3.2.006	WAGE RATE TABLES	2	2	29 CFR 516.6(a)(2).		
<b>3.2.007</b>	PY3.2.007	UNEMPLOYMENT COMPENSATION	CE+5	CE+5			
<b>3.2.008</b>	PY3.2.008	DIRECT DEPOSIT AUTHORIZATIONS	US	US			
<b>3.2.009</b>	PY3.2.009	STATE DEFERRED COMPENSATION	AC+5	AC+5	AC=After total distribution of account.		
<b>3.2.010</b>	PY3.2.010	HRIS [HUMAN RESOURCES INFORMATION SYSTEM] REPORTS AND INFORMATION	CE+4	CE+4			
<b>3.3.001</b>	HR3.3.001	AFFIRMATIVE ACTION PLANS	5	5	29 CFR 30.8(E) for apprenticeship plans.		

<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          LA-Life of Asset          MO-Months          PM-Permanent          US-Until Superseded</p>	<p>Archival Codes (Field 8)</p> <p>I- Transfer to University Archives          O- Review by University Archivist</p>
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# STATE OF TEXAS Records Retention Schedule

SLR 105  
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<b>3.3.023</b>	HR3.3.023	REIMBURSABLE ACTIVITIES, REQUESTS AND AUTHORIZATIONS TO ENGAGE IN	FE+3	FE+3				
<b>3.3.024</b>	HR3.3.024	PERSONNEL POLICIES AND PROCEDURES	US+3	US+3				
<b>3.3.025</b>	HR3.3.025	JOB PROCEDURE RECORDS	US+3	US+3				
<b>3.3.026</b>	HR3.3.026	AGENCY STAFFING REPORTS	US+3	US+3				
<b>3.3.027</b>	HR3.3.027	APTITUDE AND SKILLS TESTS	US+2	US+2				
<b>3.3.028</b>	HR3.3.028	APTITUDE AND SKILLS TESTS (TEST PAPERS)	2	2				

<b>Retention Codes (Field 7)</b> 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	<b>Archival Codes (Field 8)</b> I- Transfer to University Archives O- Review by University Archivist
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<b>3.3.029</b>	HR3.3.029	APTITUDE AND SKILLS TESTS (VALIDATION RECORDS)	LA+2	LA+2	LA=As long as the test is used by an agency.					
<b>3.3.030</b>	HR3.3.030	TRAINING ADMINISTRATION RECORDS	US+2	US+2	SEE 5.4.007 CAUTION: Does not include hazardous material training records.					
<b>3.3.031</b>	HR3.3.031	EEO [EQUAL EMPLOYMENT OPPORTUNITY] REPORTS/DOCUMENTATION	3	3	29 CFR 1602.32, 1602.39, 1602.41, 1602.48, and 1602.50.					
<b>3.3.032</b>	HR3.3.032	EQUAL PAY RECORDS	3	3	29 CFR 1620.32(c).					
<b>3.4.001</b>	PY3.4.001	ACCUMULATED LEAVE ADJUSTMENT	FE+3	FE+3						
<b>3.4.002</b>	PY3.4.002	LEAVE STATUS REPORT	FE+3	FE+3						

<b>Retention Codes (Field 7)</b> 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	<b>Archival Codes (Field 8)</b> I- Transfer to University Archives O- Review by University Archivist
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<b>3.4.003</b>	PY3.4.003	LESS THAN FULL TIME WORKED REPORTS	4	4		40 TAC815.106(i).		
<b>3.4.004</b>	PY3.4.004	OVERTIME AUTHORIZATIONS	2	2				
<b>3.4.005</b>	PY3.4.005	OVERTIME SCHEDULES	2	2				
<b>3.4.006</b>	PY3.4.006	TIME CARDS AND TIME SHEETS	FE+4	FE+4		40 TAC815.106.(i).		
<b>3.4.007</b>	PY3.4.007	TIME OFF AND/OR SICK LEAVE REQUESTS	FE+3	FE+3				
<b>3.4.008</b>	PY3.4.008	SICK LEAVE POOL DOCUMENTATION	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          LA-Life of Asset          MO-Months          PM-Permanent          US-Until Superseded</p>	<p>Archival Codes (Field 8)</p> <p>I- Transfer to University Archives          O- Review by University Archivist</p>
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<b>4.1.001</b>	FS4.1.001	ACCOUNTS PAYABLE INFORMATION	FE+3	FE+3		All audit requirements must be met.				
<b>4.1.002</b>	FS4.1.002	BILLING DETAILS	FE+3	FE+3		All audit requirements must be met. CAUTION: Does not include long distance telephone billing detail.				
<b>4.1.003</b>	FS4.1.003	CANCELLED CHECKS/WARRANTS	FE+3	FE+3		All audit requirements must be met.				
<b>4.1.004</b>	FS4.1.004	ENCUMBRANCE DETAIL	FE+3	FE+3		All audit requirements must be met.				
<b>4.1.005</b>	FS4.1.005	INVENTORY AND OTHER COST FILES	FE+3	FE+3		All audit requirements must be met.				
<b>4.1.006</b>	FS4.1.006	INVESTMENT TRANSACTION FILES	FE+3	FE+3		All audit requirements must be met.				

<p>Retention Codes (Field 7)</p> <p>AC-After Closed, Terminated, Completed, Expired, Settled          AV-Administrative Value</p> <p>CE-Calendar Year End          FE-Fiscal Year End</p> <p>LA-Life of Asset          MO-Months</p> <p>PM-Permanent          US-Until Superseded</p>	<p>Archival Codes (Field 8)</p> <p>I- Transfer to University Archives          O- Review by University Archivist</p>
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			<b>Agency Storage Total</b>							

<b>4.1.007</b>	FS4.1.007	TRANSFERS OR BUDGET REVISIONS	FE+3	FE+3	All audit requirements must be met.					
<b>4.1.008</b>	FS4.1.008	ELECTRONIC FUND TRANSFERS	FE+3	FE+3						
<b>4.2.001</b>	FS4.2.001	CASH DEPOSIT VOUCHERS	FE+3	FE+3	All audit requirements must be met.					
<b>4.2.002</b>	FS4.2.002	CASH RECEIPTS	FE+3	FE+3	All audit requirements must be met.					
<b>4.2.003</b>	FS4.2.003	DAILY CASH RECEIPT LOGS	FE+3	FE+3	All audit requirements must be met.					
<b>4.2.004</b>	FS4.2.004	ENCUMBRANCE VOUCHERS	FE+3	FE+3	All audit requirements must be met.					

<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          LA-Life of Asset          MO-Months          PM-Permanent          US-Until Superseded</p>	<p>Archival Codes (Field 8)</p> <p>I- Transfer to University Archives          O- Review by University Archivist</p>
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<b>4.2.005</b>	FS4.2.005	PURCHASE VOUCHERS	FE+3	FE+3	All audit requirements must be met.					
<b>4.2.006</b>	FS4.2.066	GENERAL JOURNAL VOUCHERS (INCLUDING INTEGRATED DATA TRANSFERS)	FE+3	FE+3	All audit requirements must be met.					
<b>4.2.007</b>	FS4.2.007	EXPENDITURE VOUCHERS TRAVEL, PAYROLL, ETC	FE+3	FE+3	All audit requirements must be met.					
<b>4.3.001</b>	FS4.3.001	SALES JOURNALS OR REGISTERS	FE+3	FE+3						
<b>4.3.002</b>	FS4.3.002	RECEIPTS JOURNALS OR REGISTERS	FE+3	FE+3						
<b>4.3.003</b>	FS4.3.003	EXPENDITURES JOURNALS OR REGISTERS	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          LA-Life of Asset          MO-Months          PM-Permanent          US-Until Superseded</p>	<p>Archival Codes (Field 8)</p> <p>I- Transfer to University Archives          O- Review by University Archivist</p>
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<b>4.4.001</b>	FS4.4.001	GENERAL LEDGER	FE+3	FE+3	All audit requirements must be met.					
<b>4.4.002</b>	FS4.4.002	ACCOUNTS RECEIVABLE LEDGERS	FE+3	FE+3	All audit requirements must be met.					
<b>4.4.003</b>	FS4.4.003	ACCOUNTS PAYABLE LEDGERS	FE+3	FE+3	All audit requirements must be met.					
<b>4.4.004</b>	FS4.4.004	EMPLOYEE SAVINGS BOND LEDGERS	FE+3	FE+3	All audit requirements must be met.					
<b>4.5.001</b>	FS4.5.001	WORKSHEETS FOR PREPARING FISCAL REPORTS - ANNUAL FINANCIAL REPORT WORKPAPERS	FE+3	FE+3	All audit requirements must be met.					
<b>4.5.002</b>	FS4.5.002	INTERNAL FISCAL MANAGEMENT REPORTS	FE+3	FE+3	All audit requirements must be met.					

<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          LA-Life of Asset          MO-Months          PM-Permanent          US-Until Superseded</p>	<p>Archival Codes (Field 8)</p> <p>I- Transfer to University Archives          O- Review by University Archivist</p>
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			<b>Agency Storage Total</b>							

<b>4.5.003</b>	FS4.5.003	ANNUAL FINANCIAL REPORTS	AC+6	AC+6	AC=Sept 1 of odd number calendar years.					
<b>4.5.005</b>	FS4.5.005	EXTERNAL FISCAL REPORTS	FE+3	FE+3	All audit requirements must be met.					
<b>4.5.006</b>	FS4.5.006	ANNUAL OPERATING BUDGETS	FE+3	FE+3	All audit requirements must be met.					
<b>4.5.007</b>	FS4.5.007	USAS REPORTS - DAILY	AC	AC	AC-Receipt and reconciliation of monthly report.					
<b>4.5.008</b>	FS4.5.008	USAS REPORTS - MONTHLY	AC	AC	AC=Receipt and reconciliation of annual report.					
<b>4.5.009</b>	FS4.5.009	USAS REPORTS - ANNUAL	FE+3	FE+3						

<b>Retention Codes (Field 7)</b> 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	<b>Archival Codes (Field 8)</b> I- Transfer to University Archives O- Review by University Archivist
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<b>4.6.001</b>	FS4.6.001	BALANCING RECORDS	FE+3	FE+3	All audit requirements must be met.					
<b>4.6.002</b>	FS4.6.002	ACCOUNT RECONCILIATIONS	FE+3	FE+3	All audit requirements must be met.					
<b>4.6.003</b>	FS4.6.003	CASH COUNTS	FE+3	FE+3	All audit requirements must be met.					
<b>4.7</b>	FS4.7	BANK COLLATERAL RECORDS	FE+3	FE+3	All audit requirements must be met.					
<b>4.7</b>	FS4.7a	BOND DESTRUCTION CERTIFICATES	PM	PM						
<b>4.7.001</b>	FS4.7.001	ACCOUNTING POLICIES AND PROCEDURES MANUAL	US+3	US+3						

<b>Retention Codes (Field 7)</b> 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	<b>Archival Codes (Field 8)</b> I- Transfer to University Archives O- Review by University Archivist
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<b>4.7.002</b>	FS4.7.002	BANK STATEMENTS	FE+3	FE+3	All audit requirements must be met.					
<b>4.7.003</b>	FS4.7.003	RETURNED CHECKS/WARRANTS/DRAFTS (UNCOLLECTIBLES)	AC+3	AC+3	AC=After deemed uncollectible.					
<b>4.7.004</b>	FS4.7.004	CAPITAL ASSET RECORDS	LA+3	LA+3						
<b>4.7.005</b>	FS4.7.005	CLAIM FILES	AC+3	AC+3	AC=Resolution of claim.					
<b>4.7.006</b>	FS4.7.006	COMPTROLLER STATEMENTS	FE+3	FE+3	All audit requirements must be met.					
<b>4.7.007</b>	FS4.7.007	DETAIL CHART OF ACCOUNTS	FE+3	FE+3						

<b>Retention Codes (Field 7)</b> 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	<b>Archival Codes (Field 8)</b> I- Transfer to University Archives O- Review by University Archivist
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4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period <b>Agency Storage Total</b>		8. Archival	9. Remarks	10. 106 No.	11. TSLAC USE ONLY		

<b>4.7.008</b>	FS4.7.008	FEDERAL GRANT RECORDS	AC+3	AC+3		AC=Satisfaction of all Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local governments (the Common Rule).		
<b>4.7.009</b>	FS4.7.009	FIXED ASSET SEQUENTIAL NUMBER LOGS	US+3	US+3				
<b>4.7.010</b>	FS4.7.010	LONG-TERM LIABILITY RECORDS, BONDS, ETC	AC+3	AC+3		AC=Retirement of Debt.		
<b>4.7.011</b>	FS4.7.011	Texas Facilities Commission (TFC) Statements	FE+3	FE+3		All audit requirements must be met.		
<b>4.7.012</b>	FS4.7.012	SIGNATURE AUTHORIZATIONS	US+FE+3	US+FE+3				
<b>5.1.001</b>	SS5.1.001	CONTRACTS, LEASES, AND AFFILIATION AGREEMENTS	AC+4	AC+4		AC=Expiration or termination of the instrument according to its terms.		

Retention Codes (Field 7) AC-After Closed, Terminated, Completed, Expired, Settled AV-Administrative Value CE-Calendar Year End FE-Fiscal Year End LA-Life of Asset MO-Months PM-Permanent US-Until Superseded	Archival Codes (Field 8) I- Transfer to University Archives O- Review by University Archivist
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<b>5.1.003</b>	SS5.1.003	DELIVERY AND RECEIVING REPORTS	2	2						
<b>5.1.004</b>	SS5.1.004	MAIL AND TELECOMMUNICATIONS LISTINGS	US	US						
<b>5.1.005</b>	SS5.1.005	POSTAGE RECORDS	FE+3	FE+3						
<b>5.1.007</b>	SS5.1.007	PRINT SHOP JOB ORDERS	AV	AV						
<b>5.1.010</b>	SS5.1.010	LICENSES AND PERMITS FOR NON-VEHICLES	AC+2	AC+2	AC=Expiration date of license or permit.					
<b>5.1.011</b>	SS5.1.011	PHOTO COPIER USE LOGS/CHARGE DETAILS	US+3	US+3						

<b>Retention Codes (Field 7)</b> 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	<b>Archival Codes (Field 8)</b> I- Transfer to University Archives O- Review by University Archivist
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<b>Agency Storage Total</b>										

<b>5.1.012</b>	SS5.1.012	CHARGE SCHEDULES/ PRICE LISTING	US+3	US+3						
<b>5.1.013</b>	SS5.01.013	INSURANCE POLICIES FOR VEHICLES & EQUIPMENT	AC+4	AC+4	AC=Expiration or termination of the policy according to its terms.					
<b>5.1.014</b>	SS5.01.014	OFFICE POLICIES AND PROCEDURES MANUALS	US+1	US+1						
<b>5.1.015</b>	SS5.1.015	CORRESPONDENCE TRACKING SYSTEMS	1	1						
<b>5.1.017</b>	SS5.1.017	CONTRACT LOG	FE+3	FE+3						
<b>5.2</b>	PP5.2	PHYSICAL PLANT MAINTENANCE RECORDS (IN HOUSE CONTRACTORS)	3	3						

Retention Codes (Field 7)	Archival Codes (Field 8)
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	I- Transfer to University Archives O- Review by University Archivist



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<b>5.2</b>	PP5.2a	PHYSICAL PLANT MAINTENANCE RECORDS (OUTSIDE CONTRACTORS)	5	5						
<b>5.2.001</b>	PP5.2.001	APPRAISALS - BUILDING OR PROPERTY	AV	AV	O					
<b>5.2.002</b>	PP5.2.002	BUILDING CONSTRUCTION PROJECT FILES	AC+10	AC+10	O	AC=Completion of Project.				
<b>5.2.003</b>	PP5.2.003	BUILDING PLANS AND SPECIFICATIONS - UNIVERSITY OWNED	LA	LA	O					
<b>5.2.003</b>	PP5.2.003a	BUILDING PLANS AND SPECIFICATIONS - LEASED	AC+2	AC+2		AC=Termination or cancellation of lease.				
<b>5.2.004</b>	PP5.2.004	BUILDING SPACE REQUESTS	1	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          LA-Life of Asset          MO-Months          PM-Permanent          US-Until Superseded</p>	<p>Archival Codes (Field 8)</p> <p>I- Transfer to University Archives          O- Review by University Archivist</p>
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# STATE OF TEXAS Records Retention Schedule

SLR 105  
Form SLR 105C must  
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2. Agency Code	<b>750</b>	3. THE UNIVERSITY OF TEXAS AT TYLER								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period	<b>Agency Storage Total</b>	8. Archival	9. Remarks	10. 106 No.	11. TSLAC USE ONLY		

<b>5.2.005</b>	PP5.2.005	CALIBRATION RECORDS (EQUIPMENT OR INSTRUMENT)	10	10						
<b>5.2.006</b>	PP5.2.006	PROPERTY DESTRUCTION CERTIFICATIONS	FE+3	FE+3						
<b>5.2.007</b>	PP5.2.007	DAMAGE REPORTS TO STATE PROPERTY	FE+3	FE+3						
<b>5.2.008</b>	PP5.2.008	EQUIPMENT HISTORY FILE/ SERVICE AGREEMENTS	LA+3	LA+3						
<b>5.2.009</b>	PP5.2.009	EQUIPMENT INVENTORY DETAIL REPORT FORMS	FE+3	FE+3						
<b>5.2.010</b>	PP5.2.010	EQUIPMENT MANUALS	LA	LA						

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<b>5.2.011</b>	PP5.2.011	EQUIPMENT WARRANTIES	AC+1	AC+1	AC=Expiration of warranty.		
<b>5.2.012</b>	PP5.2.012	ESTIMATE FILES (SUPPLY AND REPAIR COST ESTIMATE)	1	1			
<b>5.2.014</b>	PP5.2.014	ANNUAL INVENTORY (PHYSICAL) REPORT	FE+3	FE+3			
<b>5.2.015</b>	PP5.2.015	INVENTORY NOTICES OF EQUIPMENT REMOVED	FE+3	FE+3			
<b>5.2.016</b>	PP5.2.016	INVENTORY SYSTEM UPDATE LISTINGS	AC	AC	AC=Transfer of Information into annual list.		
<b>5.2.017</b>	PP5.2.017	LOST AND STOLEN PROPERTY REPORTS	FE+3	FE+3			

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<b>5.2.018</b>	PP5.2.018	QUALITY CONTROL REPORTS	2	2						
<b>5.2.019</b>	PP5.2.019	SERVICE ORDERS ON MECHANICAL EQUIPMENT	1	1						
<b>5.2.020</b>	PP5.2.020	SUPPLY USAGE RECORDS	FE+1	FE+1						
<b>5.2.021</b>	PP5.2.021	SURPLUS PROPERTY/AUCTION REPORTS	FE+3	FE+3						
<b>5.2.022</b>	PP5.2.022	UTILITY USAGE REPORTS	AV	AV						
<b>5.2.023</b>	PP5.2.023	YEAR-TO-DATE ACTIVITY (INVENTORY LISTING)	FE+3	FE+3						

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<b>5.2.024</b>	PP5.2.024	MATERIAL SPECIFICATIONS	AC+2	AC+2	AC=Material is no longer in the university.		
<b>5.2.025</b>	PP5.2.025	EQUIPMENT DESCRIPTIONS AND SPECIFICATIONS	AC+2	AC+2	AC=Equipment is no longer in the university.		
<b>5.2.026</b>	PP5.2.026	FACILITIES RESERVATION LOG/ DATABASE	2	2			
<b>5.2.027</b>	PP5.2.027	SPACE UTILIZATION REPORTS	AV	AV			
<b>5.2.028</b>	PP5.2.028	BUILDING CONSTRUCTION CONTRACTS/ INSPECTION RECORDS	LA+11	LA+11	O		
<b>5.3.002</b>	PU5.3.002	FREIGHT BILLS PAID	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          LA-Life of Asset          MO-Months          PM-Permanent          US-Until Superseded</p>	<p>Archival Codes (Field 8)</p> <p>I- Transfer to University Archives          O- Review by University Archivist</p>
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<b>5.3.003</b>	PU5.3.003	FREIGHT CLAIMS	AC+2	AC+2	AC=Resolution of claim		
<b>5.3.004</b>	PU5.3.004	CONFIRMATION ORDERS/ APPROVED PURCHASE ORDER	AV	AV			
<b>5.3.005</b>	PU5.3.005	PACKING SLIPS	AV	AV			
<b>5.3.007</b>	PU5.3.007	BID DOCUMENTATION - (REQUISITIONS, BIDS ETC)	FE+3	FE+3			
<b>5.3.008</b>	PU5.3.008	PURCHASING LOGS	FE+3	FE+3			
<b>5.3.009</b>	PU5.3.009	REQUESTS FOR INFORMATION	AC	AC	AC=Date of direct purchase, issuance of request for bids, or decision not to proceed with the procurement, as applicable.		

Retention Codes (Field 7)	Archival Codes (Field 8)
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<b>5.4.001</b>	EH5.4.001	ACCIDENT REPORTS AND ASSOCIATED DOCUMENTS	CE+5	CE+5	29 CFR 1904.33 The Texas Department of Insurance retains copies of the reports submitted to it for 50 years.
<b>5.4.002</b>	EH5.4.002	EVACUATION PLANS	US	US	
<b>5.4.003</b>	EH5.4.003	INSPECTION RECORDS (FIRE,SAFETY, ETC)	AC+3	AC+3	AC=Date of the correction of the deficiency if the inspection report revealed a deficiency.
<b>5.4.004</b>	EH5.4.004	FIRE ORDERS/DRILL REPORTS	AC+3	AC+3	AC=Deficiency corrected.
<b>5.4.007</b>	EH5.4.007	HAZARDOUS MATERIAL TRAINING RECORDS	5	5	Health and Safety Codes 502.009(g).
<b>5.4.008</b>	EH5.4.008	HAZARD COMMUNICATION PLANS	US+5	US+5	Health and Safety Codes 502.009(g).

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<b>5.4.009</b>	EH5.4.009	WORKPLACE CHEMICAL LISTS	30	30		Health and Safety Code 502.005(d).				
<b>5.4.010</b>	EH5.4.010	MATERIAL SAFETY DATA SHEETS	AC	AC		AC=After sheets are updated or hazardous chemical no longer stored by the university, as applicable.				
<b>5.4.011</b>	EH5.4.011	VISITOR CONTROL REGISTERS	3	3						
<b>5.4.012</b>	EH5.4.012	SECURITY ACCESS RECORDS	AC+2	AC+2		AC=Until superseded, date of expiration, or date of termination, whichever sooner.				
<b>5.4.013</b>	EH5.4.013	DISASTER PREPAREDNESS AND RECOVERY PLANS	US	US						
<b>5.5</b>	TC5.5	COMMUNICATION TAPES AND PRINTOUTS (INCOMING AND OUTGOING COMMUNICATIONS)	AC+3 Mos	AC+3 Mos		AC=After completion of tape.				

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<b>5.5.001</b>	TC5.5.001	BILLING DETAIL (NOT TEX-AN)	FE+3	FE+3							
<b>5.5.002</b>	TC5.5.002	LONG DISTANCE TELEPHONE LOGS	AV	AV							
<b>5.5.003</b>	TC5.5.003	STATION ACTIVITY REPORTS	AV	AV							
<b>5.5.004</b>	TC5.5.004	SYSTEM ACTIVITY REPORTS	AV	AV							
<b>5.5.006</b>	TC5.5.006	BILLING DETAIL (TEX-AN)	FE+3	FE+3							
<b>5.5.007</b>	TC5.5.007	DISPUTED CALL DOCUMENTATION	FE+3	FE+3							

Retention Codes (Field 7)	Archival Codes (Field 8)
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<b>5.6.003</b>	PP5.6.003	INSPECTION REPAIR AND MAINTENANCE RECORDS	LA+1	LA+1						
<b>5.6.004</b>	PP5.6.004	LICENSE AND DRIVING RECORDS CHECKS	AC	AC	AC=Until superseded or until termination of employment.					
<b>5.6.005</b>	PP5.6.005	VEHICLE USE REPORTS - MILEAGE, FUEL/ OIL CONSUMPTION PASSENGERS CARRIED, ETC.	FE+3	FE+3						
<b>5.6.007</b>	PP5.6.007	VEHICLE TITLES AND REGISTRATIONS	LA	LA						
<b>5.6.009</b>	PP5.6.009	PARKING PERMITS OR ASSIGNMENTS	US	US						

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