



July 3, 2013

Dr. Brian McCall
Chancellor
Texas State University System, Texas State University - San Marcos
200 E. 10th Street, Ste 600
Thomas J. Rusk Building
Austin, TX 78701

RE: Texas State University System, Texas State University - San Marcos
Retention schedule approved for use

Dear Dr. McCall:

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 Please ensure all old copies of the schedule are superseded with this recertified copy.

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

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

Your efforts in maintaining an up-to-date records retention schedule are appreciated. It not only helps to ensure the integrity of your recordkeeping practices, but it is also essential to the success of your records management program. Your schedule will be due for recertification on the last working day of **June 2016**. If you have any questions, call the information analyst assigned to your agency, Erica Wilson, at 512-463-6627.

Sincerely,

Craig Kelso
Director and State Records Administrator

Enclosure

cc: State Auditor, State Archivist
cc: (without enclosure) Brian McCall

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

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Director and Librarian*
Edward Seidenberg

*Preserving yesterday,
informing today,
inspiring tomorrow.*

R01.758/754



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 754
Agency Name Texas State University-
San Marcos

(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) Brian McCall

Date 12/7/12

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) Donna Osborne

Date 6/24/13

Cert/Recert No. 4 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.





STATE OF TEXAS Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 1 of 88

2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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 ONLY Amend. No.
			Agency	Storage	Total				

ADM = Administrative Records

4.	5.	6.	7.			8.	9.	10.	11.
Records Series Item No.	Agency Item No.	Record Series Title	Agency	Storage	Total	Archival	Remarks	106 No.	TSLAC ONLY Amend. No.
1.1.002	ADM110	Audits (Internal & External)	AC+7		AC+7		AC=Publication or release of final audit findings.		
	ADM120	Notary Public Records	10		10		TSLAC Local Schedule DC 2275-01		
1.1.056	ADM210	ADA (Americans with Disabilities Act) Documentation	3		3	I	28 CFR 35.105(c)		
1.1.021	ADM220	Open Records Requests - Exempted (Not Filled)	AC+2		AC+2		AC=Date of notification that records are exempt.		
1.1.020	ADM230	Open Records Requests - Not Exempted (Fulfilled)	AC+1		AC+1		AC=Date request fulfilled.		
1.1.072	ADM240	Open Records Requests - Reports	2		2				

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



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SLR 105
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2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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			Agency	Storage	Total				

1.1.057	ADM310	Correspondence – Ephemeral	AC	AC	AC=After purpose of record has been fulfilled. CAUTION: Records management officers should use caution in assigning this records series item number to records of an agency to make certain they are not part of another records series listed in this schedule or, for records series unique to an agency, are not part of a records series that documents the fulfillment of the statutory obligations of the agency or the documentation of its functions.		
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Retention Codes (Field 7)				Archival Codes (Field 8)	
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			Agency	Storage	Total			

1.1.008	ADM320	Correspondence – General	2	2		<p>CAUTION: This records series and item number for general correspondence (1.1.008) should be used only for correspondence that is not included in or directly related to another records series on the agency's approved schedule. For example, a memorandum that documents an appropriations request must be retained for the minimum retention period prescribed by UAD120 (1.1.004); a letter concerning an audit for that prescribed by ADM110 (1.1.002), etc. SEE ALSO item number ADM415 (1.1.011).</p>		
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2. Agency Code 754		3. Agency Name Texas State University-San Marcos						
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			Agency	Storage	Total	9. Remarks		

1.1.007	ADM330	Correspondence – Administrative	4		4	O	CAUTION: This records series and item number for administrative correspondence (1.1.007) should be used only for correspondence that is not included in or directly related to another records series on the agency's approved schedule. For example, a memorandum that documents an appropriations request must be retained for the minimum retention period prescribed by UAD120 (1.1.004); a letter concerning an audit for that prescribed by ADM110 (1.1.002), etc. SEE ALSO item number ADM415 (1.1.011).		
1.1.007	ADM340	Correspondence - Executive (President, Provost)	AC		AC	I	AC=End of term in office.		

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2. Agency Code 754		3. Agency Name Texas State University-San Marcos						
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			Agency	Storage	Total			

1.1.006	ADM405	Complaint Records	AC+2		AC+2	AC=Final disposition of the complaint. CAUTION: If a complaint becomes the subject of litigation, it must be included in and is subject to the minimum retention period of LEG610 (1.1.048).		
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Retention Codes (Field 7)				Archival Codes (Field 8)			
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2. Agency Code 754		3. Agency Name Texas State University-San Marcos						
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			Agency	Storage	Total	9. Remarks		

1.1.013	ADM410	Desk Calendars/Appointment Books	CE+1		CE+1	O	ARCHIVES NOTE: 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. CAUTION: A record of this type purchased with personal funds, but used by a state official or employee to document his or her work activities may be a state record and subject to this retention period. See Open Records Decision 635 issued in December 1995 by the Attorney General.		
1.1.011	ADM415	Directives - Executive Orders	US+3		US+3	I			
1.1.010	ADM417	Directives - General	US+1		US+1				
5.1.004	ADM420	Directory Information - Phone, Address, e-Mail Listings	US		US				

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2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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			Agency	Storage	Total				

4.	5.	6.	7.			8.	9.	10.	11.
Records Series Item No.	Agency Item No.	Record Series Title	Agency	Storage	Total	Archival	Remarks	106 No.	TSLAC ONLY Amend. No.
1.1	ADM425	Event Planning Records - Routine	AC+1		AC+1		AC=Completion of the event. AC=Discontinuance of use of form.		
1.2.003	ADM430	Forms History File	AC+1		AC+1				
1.2.004	ADM432	Forms Inventory	US		US				
1.1.069	ADM435	Logs - Attendance and Use Logs	1		1				
5.2.026	ADM437	Logs - Meeting Room Reservations	2		2				
1.1.023	ADM440	Organizational Charts	US		US	I			
1.1.008	ADM445	Routine Requests: Information or Services	2		2				
5.4.012	ADM450	Security Access Records (IDs, Keys, Passwords, etc.)	AC+2		AC+2		AC=Until superseded, date of expiration, or date of termination, whichever sooner.		
5.2.019	ADM455	Service Orders / Work Orders	1		1				
1.1.040	ADM460	Speeches and Papers -- Institutional Addresses and Statements	AC		AC	I	AC=After completion of the event, or end of term in office.		
1.1.041	ADM465	Suggestion Records	1		1				
1.1.038	ADM470	Surveys & Evaluations - Customer / Client / Employee	AC		AC		AC=Distribution of final summary report.		

Retention Codes (Field 7)	Archival Codes (Field 8)
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2. Agency Code 754		3. Agency Name Texas State University-San Marcos								
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 ONLY Amend. No.	
			Agency	Storage	Total					

1.1.043	ADM480	Training Materials (Professional Development)	FE+3		FE+3		TSLAC 1.1.043. Note: Retention was set to accommodate departmental procedures of requesting training materials each semester that a course is taught (which supersedes the US+1 requirement from 1.1.043) and to accommodate accompanying financial records.		
1.1.057	ADM499	Transitory Information	AC		AC		AC=After purpose has been fulfilled. (Usually less than 1 year; often less than 1 month.)		
1.1.058	ADM510	Meeting Minutes, Notes, & Agendas - Boards	PM		PM	I			
1.1.063	ADM520	Meeting Minutes, Notes, & Agendas - University Leadership	AC+5		AC+5	O	AC=End of semester.		
1.1.063	ADM530	Meeting Minutes, Notes, & Agendas - Academic Leadership	AC+5		AC+5	O	AC=End of semester.		
1.1.063	ADM540	Meeting Minutes, Notes, & Agendas - Faculty Senate	AC+5		AC+5	I	AC=End of semester.		
1.1.063	ADM550	Meeting Minutes, Notes, & Agendas - Staff	1		1				
1.1.063	ADM560	Meeting Minutes, Notes, & Agendas - Construction Projects	1		1	O			

Retention Codes (Field 7)				Archival Codes (Field 8)	
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2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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			Agency	Storage	Total				

1.1.063	ADM570	Meeting Minutes, Notes, & Agendas – Committees, Councils, Task Forces	2		2	O		
1.2.001	ADM730	Records Management - Destruction Authorizations	FE+3		FE+3			
1.2.010	ADM740	Records Management - Records Disposition Logs	10		10			
1.1.064	ADM610	Performance Measures - Documentation (Includes IE Data)	FE+3		FE+3		CAUTION: The FE + 3 retention period overrides any shorter retention period for a records series in this schedule if the records series is needed for documentation of agency performance measures.	
1.1.024	ADM630	Plans and Planning Records	AC+3		AC+3	O	AC=Decision made to implement or not to implement result of planning process.	
1.1.055	ADM640	Strategic Plans - University Level	AC+6		AC+6	I	AC=September 1 of odd-numbered calendar years. ARCHIVES NOTE: The archival requirement is met by sending the required copies of the plans to the Texas State Publications Depository Program, Texas State Library and Archives Commission.	

Retention Codes (Field 7)				Archival Codes (Field 8)	
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	I – Transfer to Univ Archives	
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2. Agency Code 754		3. Agency Name Texas State University-San Marcos						
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			Agency	Storage	Total			

4.	5.	6.	7.			8.	10.	11.
Records Series Item No.	Agency Item No.	Record Series Title	Agency	Storage	Total	Archival	106 No.	TSLAC ONLY Amend. No.
1.1.055	ADM645	Strategic Plans - Departmental Level	AC+6		AC+6	AC=September 1 of odd-numbered calendar years.		
1.2.014	ADM710	Records Management - Plans	US+1		US+1			
1.2.005	ADM720	Records Management - Records Retention Schedule	US		US			
1.2.008	ADM750	Records Management - Request for Authority to Dispose of State Records (RMD102)	FE+3		FE+3	Original is retained by the State and Local Records Management Division, Texas State Library and Archives Commission.		
1.2.006	ADM760	Records Management - Transmittal Forms	AC+2		AC+2	AC=Date of authorization for destruction, permanent transfer from storage, or transfer to the University Archives.		
1.2.012	ADM770	Records Inventory Worksheets	US		US			
1.1.067	ADM810	Reports and Studies (Non-Fiscal) - Final	3		3	O		
1.1.065	ADM820	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 records series in this schedule. See especially ADM610 - Performance Measures/IE Data (1.1.064).		

Retention Codes (Field 7)				Archival Codes (Field 8)	
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2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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			Agency	Storage	Total				

1.1.067	ADM830	Reports and Studies (Non-Fiscal) - Statistical	3		3	O			
1.1.068	ADM840	Reports - University Performance and Fund Management	AC+6		AC+6		AC=September 1 of odd-numbered calendar years.		
1.1.069	ADM850	Reports - Routine Activity	1		1				

Retention Codes (Field 7)				Archival Codes (Field 8)	
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SLR 105

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2. Agency Code 754		3. Agency Name Texas State University-San Marcos								
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			Agency	Storage	Total					

ADV = Advancement, Alumni, and Public Relations

1.1	ADV110	Annual Fund Drive Records	10		10				
1.1	ADV120	Friends Records	FE+5		FE+5	O			
1.1	ADV130	Gifts Records - Deferred Gifts / Donor Files (Guardian Club)	PM		PM	O			
1.1	ADV140	Gifts Records - Deferred Gifts Realized (Legal Papers)	AC+3		AC+3	I	AC=Date gift realized.		
1.1	ADV150	Class Gift Records	5		5	I			
1.1	ADV200	Alumni Records	PM		PM	I			
1.1	ADV230	Alumni Association Services Program Records	5		5	O			
1.1	ADV240	Alumni Association Records	5		5	I			
1.1.019	ADV310	News / Press Releases - University	2		2	I			
1.1.019	ADV320	News / Press Releases - Departmental	5		5	I			
1.3.001	ADV330	Publications	AC+5		AC+5	I	AC=Until superseded or obsolete. ARCHIVES NOTE: The archival requirement is met by sending the required copies of the publications to the Texas State Publications Depository Program, Texas State Library and Archives Commission.		

Retention Codes (Field 7)				Archival Codes (Field 8)	
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4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Agency	7. Storage	7. Total	8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
1.3.001	ADV340	Publications - Brochures	AC+2		AC+2	I	AC=Until superseded or obsolete.		
1.3.002	ADV350	Publications - Development Files	FE+3		FE+3	O			
1.1	ADV360	Topical Reference - Subject (Regular "Morgue" files)	AV		AV	I			
1.1	ADV370	Topical Reference - Biography (People "Morgue" files)	AV		AV	I			
1.1	ADV380	Photographs	AV		AV	I			
1.1	ADV390	Films, Videotapes, and Sound Recordings	AC		AC	O	AC=After completion of the event, until superseded, or until obsolete.		

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Records Retention Schedule

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2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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			Agency	Storage	Total				

CHD = Child Development Center

4.1.002	5.	6.	7. Retention Period			8.	9.	10.	11.
	Agency Item No.	Record Series Title	Agency	Storage	Total	Archival	Remarks	106 No.	TSLAC ONLY Amend. No.
	CHD100	License Records	AC+2		AC+2		AC=After superseded, expiration, or obsolete.		
	CHD110	Food/Nutrition Service Program Records	4		4		Complies with 7 CFR 210 and 225 (U.S. Department of Agriculture)		
	CHD200	Client Records	AC+2		AC+2		AC=End of last semester of enrollment. TAC 36.006 requires records be maintained. DFPS 746.603, 746.605		
	CHD210	Clinical Logs	AC+7		AC+7		AC=Last contact with client (or retain until client reaches age 21, whichever is longer). 22 TAC 165		
4.1.002	CHD300	Child Care Subsidy Financial Records	FE+3		FE+3				

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CUR = Curriculum

4.	5.	6.	7.			8.	9.	10.	11.
Records Series Item No.	Agency Item No.	Record Series Title	Agency	Storage	Total	Archival	Remarks	106 No.	TSLAC ONLY Amend. No.
1.3.001	CUR110	Catalogs / Bulletins	AC+2		AC+2	I	AC=Until superseded or obsolete.		
1.1	CUR120	Schedule of Classes	PM		PM	I	AACRAO Schedule E		
1.1	CUR130	Student Handbooks	US+2		US+2	I			
1.1	CUR210	Academic Degree & Course Proposals	AC+10		AC+10	I	AC=Until the degree or course proposal is ceased or superseded.		
	CUR220	Curriculum Development Files (Course and Program)	AC+10		AC+10	I	AC=When the course, program, or certificate is ceased. TSLAC Local Schedule JC 3900-01.		
1.1	CUR230	Course Records	AC+2		AC+2	O	AC=End of semester. Provost Office recommends 2 year retention for academic departments.		
1.1	CUR240	Course Records - Faculty Workload Reports	AC+2		AC+2	I	AC=End of semester.		
1.1	CUR250	Course & Lab Fee Forms	AC+10		AC+10		AC=When the course is ceased. Texas Education Code, Title 3, 54.504		
1.1	CUR310	Non-University Student Program Administration Records	10		10	O			

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



STATE OF TEXAS Records Retention Schedule

SLR 105
Form SLR 105C must accompany this form.

1. Page 16 of 88

2. Agency Code 754		3. Agency Name Texas State University-San Marcos						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total			

1.1.064	CUR400	Academic Program Reviews (APR)	US		US	I	US=until superseded. NOTE: Coordinating board changed to review period to every 7 years (starting in 2012). When a new APR is received for a program, send the previous APR to the University Archives.		
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Retention Codes (Field 7)				Archival Codes (Field 8)	
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	I – Transfer to Univ Archives	
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	O – Review by Univ Archivist	



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Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 17 of 88

2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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 ONLY Amend. No.
			Agency	Storage	Total				

EDP = Electronic Data Processing

2.2.010	EDP110	Data Processing Policies & Procedures	US+3		US+3	CAUTION: Does not include technical documentation of procedures necessary for reading or processing of electronic records. See EDP270 for Technical Documentation.		
2.2.002	EDP130	Chargeback Records (IDT) to Data Processing Services Users	FE+3		FE+3			
2.2.016	EDP150	Software Management: Registrations, Warranties, and License Agreements	LA+3		LA+3			
2.1.010	EDP210	Audit Trail Records	AC		AC	AC=All audit requirements have been met.		

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



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Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 18 of 88

2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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 ONLY Amend. No.
			Agency	Storage	Total				

2.1.002	EDP220	Database Master Files - Ongoing Electronic Records	AC		AC	AC=Completion of 3rd verification cycle, or audit completion confirming successful transaction updates, or required audit trail maintenance, or the ability to restore or migrate when errors are detected, or when hardware or software changes occur. Note: For most databases, retention is determined by the function of the record; refer to the appropriate record series listed within this schedule to determine approved retention. CAUTION: Records management officers must be certain before assigning the retention period of AC to agency automated processing files that the files do not fall under records series listed elsewhere.		
2.1.011	EDP230	Finding Aids, Indexes and Tracking Systems	AC		AC	AC=The related records have been destroyed. CAUTION: These records must carry the same retention period and archival code of the records they support.		

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



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Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 754		3. Agency Name Texas State University-San Marcos						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total			

2.1.008	EDP240	Hardware Management and Documentation	AC		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. 13 TAC 6.94 CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.		
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Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	I – Transfer to Univ Archives			
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	O – Review by Univ Archivist			



STATE OF TEXAS Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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 ONLY Amend. No.
			Agency	Storage	Total				

2.1.001	EDP250	Processing Files	AC	AC		AC=Completion of 3rd verification cycle, or audit completion confirming successful transaction processing, or required audit trail maintenance, or the ability to restore or migrate when errors are detected or when hardware or software changes occur. CAUTION: Records management officers must be certain before assigning the retention period of AC to agency automated processing files that the files do not fall under records series listed elsewhere.		
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Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	I – Transfer to Univ Archives			
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	O – Review by Univ Archivist			



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Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 21 of 88

2. Agency Code 754		3. Agency Name Texas State University-San Marcos						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total			

2.1.007	EDP260	Software Programs	AC		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. 13 TAC 6.94 CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.		
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Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	I – Transfer to Univ Archives			
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	O – Review by Univ Archivist			



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Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

1. Page 22 of 88

2. Agency Code 754		3. Agency Name Texas State University-San Marcos						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total	9. Remarks		

2.1.009	EDP270	Technical Documentation	AC	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. 13 TAC 6.94. CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.		
2.2.011	EDP310	Batch Data Entry Control Records	AC	AC	AC=When reconciliation confirmed.		
2.2.004	EDP320	Computer Job Schedules/Reports	3 MO	3 MO			
2.2.015	EDP330	Internet Browser History / Web Sites Visited	AV	AV			
2.2.014	EDP335	Internet Cookies	AV	AV			
2.2.012	EDP340	Output Records for Computer Production	AV	AV			
2.2.013	EDP350	Quality Assurance Records	AC	AC	AC=No longer needed as an audit trail for any records modified.		

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



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Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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 ONLY Amend. No.
			Agency	Storage	Total				
2.2.001	EDP360	System Monitoring Records / Logs	1		1				

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



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Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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 ONLY Amend. No.
			Agency	Storage	Total				

EQS = Equipment and Supplies

5.2.018	EQS110	Quality Control Reports	2		2				
5.2.021	EQS120	Surplus Property Sale Reports	FE+3		FE+3				
5.2.020	EQS130	Supply Usage Records	FE+1		FE+1				
5.2.005	EQS210	Calibration Records (Equipment or Instrument)	10		10				
5.2.025	EQS220	Equipment Descriptions & Specifications	AC+2		AC+2		AC=Equipment is no longer at the University.		
5.2.008	EQS230	Equipment History File (Maintenance, Warranties, Logs)	LA+3		LA+3				
5.2.009	EQS240	Equipment Inventory Detail Report	FE+3		FE+3				
5.2.010	EQS250	Equipment Manuals	LA		LA				
5.2.010	EQS260	Equipment Manuals - A/C Compressor	LA+3		LA+3				
5.2.014	EQS310	Inventory - Annual Physical	FE+3		FE+3				
5.2.015	EQS330	Inventory - Equipment Removed from Inventory	FE+3		FE+3				
5.2.023	EQS340	Inventory Listing - Year-to-date Activity	FE+3		FE+3				
5.2.016	EQS350	Inventory System Update Listings	AC		AC		AC=Transfer of information into annual inventory listing.		
5.2.017	EQS360	Lost & Stolen Property Reports	FE+3		FE+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 Univ Archives O – Review by Univ Archivist



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Records Retention Schedule

SLR 105

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2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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 ONLY Amend. No.
			Agency	Storage	Total				

FCL = Facilities Management

5.2.002	FCL100	Capital Construction Project Records	AC+10		AC+10	I	AC=Completion of project.		
5.2.002	FCL110	Building Construction / Renovation Project Files	AC+10		AC+10	O	AC=Completion of Project.		
5.2.028	FCL120	Building Construction Contract & Inspection Records	LA+10		LA+10	O			
5.2.003	FCL130	Building Plans and Specifications (University Owned Property)	LA		LA	O			
5.2.003	FCL135	Building Plans and Specifications (Leased Property)	AC+2		AC+2	O	AC=After completion of the lease.		
5.2.024	FCL140	Material Specifications	AC+2		AC+2		AC=Material is no longer in the University.		
5.2.004	FCL210	Building Space Requests	1		1				
5.2.027	FCL220	Space Utilization Reports	AV		AV				
5.2.026	FCL230	Facilities Reservation Logs	2		2				
5.2.007	FCL320	Damage Reports	FE+3		FE+3				
5.2.006	FCL330	Property Destruction, Certificates of	FE+3		FE+3				
5.2.022	FCL410	Utility Usage Reports	AV		AV				
5.6.003	FCL810	Vehicle Files (Ownership & Activity)	LA+1		LA+1				
5.6.007	FCL820	Vehicle Titles & Registrations	LA		LA				
5.6.003	FCL830	Vehicle Inspection, Repair, and Maintenance Records	LA+1		LA+1				
5.6.005	FCL840	Vehicle Use Reports	FE+3		FE+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 Univ Archives O – Review by Univ Archivist



STATE OF TEXAS Records Retention Schedule

SLR 105

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2. Agency Code 754		3. Agency Name Texas State University-San Marcos						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total			
5.6.004	FCL850	License and Driving Record Checks	AC		AC	AC=Until superseded or until termination of employment.		

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



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Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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 ONLY Amend. No.
			Agency	Storage	Total				

FIN = Fiscal / Financial

4.1.001	FIN110	Accounts Payable Information	FE+3		FE+3				
4.1.002	FIN120	Billing Detail / Department Account Records	FE+3		FE+3				
4.1.002	FIN121	Student charge records(4-CA)	10		10				
4.3	FIN125	General Property Deposits - Refunds, Forfeits, Assignments	FE+3		FE+3				
4.1.003	FIN130	Canceled Checks/Stubs/Warrants/Drafts	FE+3		FE+3				
4.1.004	FIN140	Encumbrance Detail	FE+3		FE+3				
4.1.005	FIN150	Inventory and Other Cost Files	FE+3		FE+3				
4.1.006	FIN160	Investment Transaction Files	FE+3		FE+3				
4.1.007	FIN170	Cost Center Transfers / Transmittals / Budget Revisions	FE+3		FE+3				
4.1.008	FIN180	Electronic Fund Transfers	FE+3		FE+3				
4.2.001	FIN210	Cash Deposit Vouchers	FE+3		FE+3				
4.2.002	FIN220	Cash Receipts	FE+3		FE+3				
4.2.003	FIN230	Daily Cash Receipts Logs	FE+3		FE+3				
4.2.004	FIN240	Encumbrance Vouchers	FE+3		FE+3				
4.2.005	FIN250	Purchase Vouchers / Requisitions / Orders (Includes P-Cards)	FE+3		FE+3				
4.2.006	FIN260	General Journal Vouchers	FE+3		FE+3				
4.2.007	FIN270	Expenditure Vouchers	FE+3		FE+3				
4.3.001	FIN310	Sales Journals or Registers	FE+3		FE+3				

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



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Records Retention Schedule

SLR 105

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2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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 ONLY Amend. No.
			Agency	Storage	Total				

4.3.002	FIN320	Receipt Journals or Registers	FE+3		FE+3				
4.3.002	FIN321	Receipt Journals or Registers: CUFS Monthly Reports/Cash Blotter(4-AC)	FE+10		FE+10				
4.3.002	FIN322	Receipts Journals or Registers: Gift-In-Kind Records	PM		PM				
4.3.003	FIN330	Expenditures Journals or Registers	FE+3		FE+3				
4.3.003	FIN331	Expenditures Journals or Registers: Warrant Register /CUFS Monthly Reports(4-AC)	FE+10		FE+10				
4.4.001	FIN410	General and Subsidiary Ledgers	FE+3		FE+3				
4.4.001	FIN411	CUFS Monthly Reports/General Ledgers (4-AC)	FE+10		FE+10				
4.4.002	FIN420	Accounts Receivable Ledgers	FE+3		FE+3				
4.4.003	FIN430	Accounts Payable Ledgers	FE+3		FE+3				
4.4.004	FIN440	Employee Savings Bond Ledgers	FE+3		FE+3				
4.5.001	FIN510	Fiscal Reports - Working Files	FE+3		FE+3				
4.5.003	FIN511	Annual Financial Report - Working Files	AC+6		AC+6		AC=September 1 of odd-numbered years.		
4.5.002	FIN520	Internal Fiscal Management Reports	FE+3		FE+3				
4.5.002	FIN521	Internal Fiscal Management Reports (4-AC, 4-CA)	FE+10		FE+10				

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 Univ Archives O – Review by Univ Archivist



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Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 754		3. Agency Name Texas State University-San Marcos						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total			

4.5.003	FIN530	Annual Financial Report - Texas State University-San Marcos	AC+6		AC+6	I	AC=September 1 of odd-numbered years. CAUTION: If an agency does not produce a biennial or annual narrative report as described in item number 1.1.066, then these annual financial reports must be marked with Archival Code A. The archival requirement, when a biennial or annual narrative report is not produced, is met by sending the required copies of the reports to the Texas State Publications Depository Program, Texas State Library and Archives Commission.		
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Retention Codes (Field 7)				Archival Codes (Field 8)	
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	I – Transfer to Univ Archives	
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	O – Review by Univ Archivist	



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Records Retention Schedule

SLR 105
Form SLR 105C must accompany this form.

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2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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 ONLY Amend. No.
			Agency	Storage	Total				

4.5.003	FIN531	Annual Financial Report - Friends Groups	AC+6		AC+6	O	AC=September 1 of odd-numbered calendar years. CAUTION: If an agency does not produce a biennial or annual narrative report as described in item number 1.1.066, then these annual financial reports must be marked with Archival Code A. The archival requirement, when a biennial or annual narrative report is not produced, is met by sending the required copies of the reports to the Texas State Publications Depository Program, Texas State Library and Archives Commission.		
4.5.005	FIN550	External Fiscal Reports	FE+3		FE+3	.			
4.5.005	FIN551	Federal Tax Returns	FE+8		FE+8	O	IRS pub 552.		
4.5.005	FIN552	Property Tax Exemption Claim Records	FE+8		FE+8	I	IRS pub 552.		
4.5.006	FIN560	Annual Operating Budgets	FE+3		FE+3	I			
4.6.001	FIN610	Balancing Records	FE+3		FE+3				
4.6.001	FIN611	Balancing Records: Monthly Operating Report (4-AC)	FE+10		FE+10				
4.6.002	FIN620	Reconciliations	FE+3		FE+3				

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



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Records Retention Schedule

SLR 105
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2. Agency Code 754		3. Agency Name Texas State University-San Marcos								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title			7. Retention Period		8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.
		Agency	Storage	Total	9. Remarks					

4.6.002	FIN621	Long Term Bond Coupons	25		25				
4.6.002	FIN622	Reconciliations: Bond Coupons Destruction Certificates	25		25				
4.6.003	FIN630	Cash Counts	FE+3		FE+3				
4.7.002	FIN720	Bank Statements	FE+10		FE+10				
4.7.003	FIN730	Returned Checks / Warrants / Drafts (Uncollectible)	AC+3		AC+3		AC=After deemed uncollectible.		
4.7.004	FIN740	Capital Asset Records	LA+3		LA+3				
4.7.005	FIN750	Claim Files	AC+3		AC+3		AC=Resolution of claim.		
4.7	FIN760	Unclaimed Property Records	10		10		Texas Comptroller of Public Accounts, Holder Information: Reporting Unclaimed Property Retention Note: Unclaimed property includes uncashed checks.		
4.7.007	FIN770	Detail Chart of Accounts	FE+3		FE+3				
4.7.010	FIN810	Long-Term Liability Records	AC+3		AC+3		AC=Retirement of debt.		
4.7.011	FIN820	Texas Building and Procurement Commission Statements	FE+3		FE+3		FE=Fiscal year end.		
4.7.012	FIN830	Signature Authorizations	US+ FE+3		US+ FE+3		Until superseded, then fiscal year end + 3 years.		
5.2.001	FIN910	Appraisals - Building or Property	AV		AV	O			

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



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SLR 105

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2. Agency Code 754		3. Agency Name Texas State University-San Marcos						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total			

ICA = Intercollegiate Athletics

ICA Code	Record Series Title	Agency	Storage	Total	Archival	Remarks	106 No.	TSLAC ONLY Amend. No.
ICA100	Equity Athletics Disclosure Act (EADA) Records	AC+6		AC+6	O	AC=Submission of the report. No legal requirements. NCAA relies solely on institutional retention policies; it does not set retention requirements.		
ICA200	Recruiting Records	AC+5		AC+5		AC=End of recruiting season.		
ICA300	Student Athlete Academic - Athletic Eligibility Records	AC+10		AC+10		AC=Student separation from the department or University. <i>Legal References: The NCAA Division I Bylaw 22.2.1.2 requires a self-study at least every 10 years.</i>		
ICA400	Student Athletes - Individual Athlete Records	AC+5		AC+5	O	AC=Student separation from the department or University.		
ICA410	Student Athletes - Medical Records	AC+7		AC+7		AC=Student separation from University. Based on Medical Records retention, 22 TAC 165.		
ICA420	Positive Drug Test Records	AC+7		AC+7		AC=Student separation from University. Based on Medical Records retention, 22 TAC 165.		

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



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Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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 ONLY Amend. No.
			Agency	Storage	Total				

4.1.002	ICA700	Ticket Sales Records	FE+3		FE+3				
	ICA430	Intercollegiate Athletic Insurance Claim Records	AC+7		AC+7		AC=Claim close date, or date of last activity on claim. Based on Medical Records retention, 22 TAC 165.		
	ICA500	Sport - Game Records	PM		PM	I			
	ICA510	Sport - Practice Schedule / Reports	AC+5		AC+5		AC=End of sport season Retention period set to match athlete (ICA400) and eligibility (ICA300) records to facilitate NCAA audits.		
	ICA520	Sport - Away Game Arrangements / Travel Itinerary	AC+5		AC+5		AC=End of sport season. Retention period set to match athlete (ICA400) and eligibility (ICA300) records to facilitate NCAA audits.		
	ICA530	Sport - Competition Contracts and Scheduling Records	AC+5		AC+5		AC=End of sport season. Retention period set to match athlete (ICA400) and eligibility (ICA300) records to facilitate NCAA audits.		

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



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			Agency	Storage	Total			

5.1.001	ICA750	Concession/Lease/Licensing Agreements	AC+4		AC+4	AC=Termination of the lease/agreement. See LEG200 and LEG400 (Contracts and Licensing Agreements), per General Counsel.		
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Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	I – Transfer to Univ Archives			
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			Agency	Storage	Total				

LEG = Legal

Records Series Item No.	Agency Item No.	Record Series Title	Agency	Storage	Total	Archival	Remarks	106 No.	TSLAC ONLY Amend. No.
	LEG100	Real Property Records	PM		PM	I	Records have historical value; long-term preservation storage may need to be addressed.		
5.1.010	LEG110	Facilities Licenses, Permits, and Certificates	AC+2		AC+2		AC=Expiration date of license or permit. Per General Counsel.		
5.1	LEG200	Trademarks Licensing Records	AC+4		AC+4		AC=Expiration of license. Per General Counsel.		
5.1	LEG300	Intellectual Property Agreements	AC+4		AC+4	O	AC=Expiration of agreement. Per General Counsel. Some records have historical value and require preservation; contact the University Archives when the active retention period has expired. For ongoing contracts and releases, long-term preservation storage may need to be addressed.		

Retention Codes (Field 7)				Archival Codes (Field 8)	
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			Agency	Storage	Total			

5.1.001	LEG400	Contracts and Leases (including Service Contracts)	AC+4	AC+4	O	AC=Expiration of contract. Some records related to leasing space have historical value and require preservation; contact the University Archives when the active retention period has expired.		
5.1	LEG410	Contracts and Agreements Records - Internal	AC+2	AC+2		AC=Expiration of contract. Per General Counsel.		
5.1.017	LEG420	Contract Log	FE+3	FE+3				
5.1	LEG450	Memoranda of Understanding and Waivers	AC+4	AC+4		AC=Expiration of agreement. Per General Counsel.		
5.1	LEG500	Waivers: Hold Harmless, Liability, and Release Records	AC+4	AC+4		AC=Conclusion of event. Per General Counsel.		
1.1.014	LEG600	Legal Opinions and Advice	AV	AV	O	Some records have historical value and require preservation; contact the University Archives when the active retention period has expired.		

Retention Codes (Field 7)	Archival Codes (Field 8)
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CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months
PM – Permanent US – Until Superseded	



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			Agency	Storage	Total				

1.1.048	LEG610	Litigation Files	AC+1		AC+1	O	<p>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.</p> <p>Some records have historical value and require preservation; contact the University Archives when the active retention period has expired.</p>		
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Retention Codes (Field 7)				Archival Codes (Field 8)	
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	I – Transfer to Univ Archives	O – Review by Univ Archivist
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			Agency	Storage	Total					

LIB = Library and Special Collections

1.1.069	LIB110	Patron Attendance and Use Logs	1		1				
1.2.013	LIB120	Records Control Materials/Location Guides	AC		AC		AC= When control aid is updated, revised, or no longer needed.		
2.2.016	LIB210	Electronic Resource Management / License Management	LA+3		LA+3				
1.1.057	LIB310	Acquisitions Records	AC		AC		AC=After the request is filled or becomes inactive.		
1.1.064	LIB320	Cataloging Records	FE+3		FE+3				
1.1.057	LIB330	Circulation Records - Borrowing & Use	AC		AC		AC=Until the transaction is completed.		
4.2.002	LIB332	Circulation Records - Courtesy Borrowers Records	FE+3		FE+3		<i>Retention based on TSLAC 4.2.002 (Cash Receipts) because there are sometimes charges associated with this series.</i>		
4.2.002	LIB335	Circulation Records - Fines & Fees	FE+3		FE+3				
4.2.002	LIB340	Inter-Library Loan (ILL) Records	FE+3		FE+3		<i>Retention based on TSLAC 4.2.002 (Cash Receipts) because there are sometimes charges associated with this series.</i>		
1.1.064	LIB350	Reference Records	FE+3		FE+3				

Retention Codes (Field 7)					Archival Codes (Field 8)				
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			Agency	Storage	Total				

1.1.057	LIB360	Serials Records	AC		AC		AC=After cataloging complete.		
	LIB410	Special Collections: Accession Register	PM		PM	I			
	LIB420	Special Collections: Collection / Artifact Loan Register	PM		PM	I			
	LIB430	Special Collections: Collection / Donor Files	PM		PM	I			
	LIB440	Special Collections: Event & Exhibit Records	PM		PM	I			
	LIB450	Special Collections: Patron / Visitor Logs	PM		PM	I			
4.1.002	LIB500	Faculty Research Grant – Library Materials	FE+3		FE+3	O	Some records are historical and require preservation; contact the University Archivist for assistance. <i>Referencing TSLAC 4.1.002 because this is an accounting record; materials are purchased using these funds are linked back to the specific grant.</i>		
3.1.014	LIB900	Career Ladder Promotion Evaluation Records	AC+2		AC+2		AC=End of promotion review cycle. <i>Retention based on employee performance appraisal; 29 CFR 1620.32(c).</i>		

Retention Codes (Field 7)				Archival Codes (Field 8)	
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			Agency	Storage	Total				

PER = Personnel

3.1.012	PER110	Employment Opportunity Announcements / Job Postings	2		2	29 CFR 1602.49(a) [State Universities]		
3.1.034	PER120	Resumes - Unsolicited	AV		AV			
3.1.001	PER130	Applications for Employment - Not Hired	2		2	29 CFR 1602.49(a) [State Universities]		
3.1.014	PER150	Employment Selection Records - Search Committee Files	2		2	29 CFR 1602.49(a) [State Universities].		
3.1.023	PER200	Job Descriptions / Procedures (GOJAs)	AC+4		AC+4	AC=Until superseded or job eliminated. 40 TAC 815.106(i);		
3.1.026	PER210	Criminal History Checks	AC		AC	AC=When the criminal history record has served the immediate purpose for which it was obtained.		
3.1.029	PER215	Employment Eligibility / Federal I-9 Forms	AC+1		AC+1	AC=Termination of employment. 8 CFR 274a.2(b)(2)(i)(A) and (c)(2)		
3.1.038	PER220	Public Access / Non-Disclosure Form (Employee Privacy Election)	US		US	Retain most current version in HR personnel file for AC+75. Texas Public Information Act, Government Code 55.2024		
3.1.022	PER225	Personnel Change Requests (PCR) - Departmental Copies	AC+5		AC+5	AC=Termination of employment. 29 CFR 1602.49(a) [State Universities]		

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			Agency	Storage	Total	9. Remarks		

3.1.013	PER230	Employment Contracts	AC+4		AC+4	AC=Expiration or termination of the contract according to its terms.		
3.1.035	PER235	Performance Bonds	AC+4		AC+4	AC=Expiration of the bond according to its terms.		
3.1.036	PER240	Apprenticeship Records	AC+5		AC+5	AC=After the apprenticeship is filled. 29 CFR 30.8(e)		
3.1.018	PER250	Employee Grievance Records	AC+2		AC+2	AC=Final decision on the grievance. 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.		

Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	I – Transfer to Univ Archives			
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			Agency	Storage	Total				

3.1.039	PER255	Employee Ombudsman Records	AC		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.		
3.1.006	PER260	Employee Counseling Records	AC+3		AC+3	AC=Termination of counseling.		
3.1.020	PER270	Employee / Personnel Corrective Action Documentation	AC+5		AC+5	AC=Termination of corrective action. CAUTION: If, during the retention period of this records series, any part of this series is used to document and support personnel disciplinary action under PER285, (TSLAC item number 3.1.021), all documentation from this series used to support disciplinary action must be retained for the minimum retention period described by PER285.		
3.1.021	PER285	Employee / Personnel Disciplinary Action Documentation	AC+5		AC+5	AC=Termination of employment.		

Retention Codes (Field 7)				Archival Codes (Field 8)			
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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 ONLY Amend. No.
			Agency	Storage	Total				

3.3.011	PER310	Employee Retirement Selection – Optional Retirement Program / Teachers Retirement System / Texas Employee Retirement System	AC+75		AC+75		AC=Termination of employment.		
3.1.011	PER320	Employee Insurance Records	AC		AC		AC=Until superseded or termination of employment.		
3.1.019	PER410	Performance Appraisals - Staff	2		2		29 CFR 1620.32(c)		
3.1.019	PER420	Performance Appraisals - Tenure or Promotion Track Employees	AC+2		AC+2		AC=The end of the tenure or career ladder review period. 29 CFR 1620.32(c)		
3.1	PER440	Faculty Tenure & Promotion Records	AC+5		AC+5		AC=Completion of the annual tenure review process.		
3.1.037	PER450	Employee Recognition Records	AC+5		AC+5		AC=Termination of employment.		
3.1.027	PER460	Training and Educational Achievement Records (Individual - Formal Training)	AC+5		AC+5		AC=Termination of employment.		
3.1.002	PER510	Personnel Files (Human Resources)	AC+5		AC+5		AC=Termination of employment.		
3.1.002	PER520	Personnel Files - Faculty, Tenured and Tenure-Track (Faculty Records)	AC+10		AC+10	I	AC=Termination of employment. 29 CFR 1602.49; required for SACS review.		
3.1.002	PER530	Personnel Files - Faculty, Adjunct (Faculty Records)	AC+10		AC+10		AC=Termination of employment. Required for SACS review.		

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



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			Agency	Storage	Total				

4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Agency	7. Storage	7. Total	8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
3.1.002	PER550	Personnel Files - Departmental Copies	AC+5		AC+5	O	AC=Employee separation from department (transfer or termination).		
3.3.011	PER600	Former Employee Verification / Prior State Service Records	AC+75		AC+75		AC=Termination of employment.		
3.3.015	PER605	Position / Job Classification Review File (GOJAs)	US+3		US+3				
3.3.024	PER610	Personnel Policies & Procedures	US+3		US+3	I			
3.3.027	PER620	Employment Testing (Aptitude & Skills Tests)	US+2		US+2		29 CFR 1602.49 [State Universities].		
3.3.028	PER621	Employment Testing (Test Papers)	2		2		29 CFR 1602.49 [State Universities].		
3.3.029	PER622	Employment Testing (Validation Records)	AC+2		AC+2		AC = As long as the test is used by an agency. 29 CFR 1602.49 [State Universities].		
3.3.030	PER625	Training Materials - Administrative (Personnel) Training	US+2		US+2				
3.3.020	PER630	Work Schedules/Assignments	1		1				
3.3.023	PER640	Reimbursable Activities (Travel, Education, Professional Development)	FE+3		FE+3				

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			Agency	Storage	Total	9. Remarks		

3.1.031	PER650	Benefit Plans	AC+2		AC+2	29 CFR 1627.3(b)(2) AC = Until superseded or termination of employment. CAUTION: Documents that serve as payroll deduction authorizations must be maintained for the retention period prescribed for PER720 (3.2.001).		
3.3.001	PER660	Affirmative Action Plans	5		5	29 CFR 30.8(e) for apprenticeship plans		
3.3.026	PER665	Agency Staffing Reports	US+3		US+3			
3.3.031	PER670	EEO Reports and Supporting Documentation	3		3	29 CFR 1602.32, 1602.39, 1602.41, 1602.48, and 1602.50		
3.3.032	PER675	Equal Pay Records	3		3	29 CFR 1620.32		
3.2.010	PER680	Human Resources Information System (HRIS) Reports	AC+4		AC+4	AC=After completion of the issue for which the report was created.		
3.3.010	PER685	Labor Statistics Report	3		3			
3.3.022	PER690	Texas Workforce Commission (TWC) Reports	3		3			
3.2.002	PER700	Employee Earnings Record (Payroll)	4		4	40 TAC 815.106(i) and 20 CFR 516.3		
3.2.008	PER710	Direct Deposit Authorizations	US		US	US=Until superseded or employment is terminated.		

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			Agency	Storage	Total			

3.2.001	PER720	Employee Deduction / Garnishment Authorizations	AC+4		AC+4	AC=Termination of employee, or after amendment, expiration, or termination of authorization, whichever is sooner.		
3.2.004	PER730	Income Adjustments Authorizations	2		2	29 CFR 516.6(c)		
3.2.009	PER740	Deferred Compensation / State 457 Plan	AC+5		AC+5	AC=All accounts with a vendor or vendors for the individual participant have been closed.		
3.2.003	PER760	Federal Tax Records	AC+4		AC+4	AC=Tax due date, date the claim is filed, or date tax is paid whichever is later. 26 CFR 31.6001-1(e)(2);		
3.2.005	PER765	W-4 Forms	AC+4		AC+4	AC=Until superseded, obsolete, or upon separation of employee. 26 CFR 31.6001-1 (e)(2)		
3.2.007	PER770	Unemployment Compensation Records	AC+5		AC+5	AC=After compensation completed. TSLAC 3.2.007		
3.2.006	PER780	University Pay Plan	AC+2		AC+2	AC=After superseded. 29 CFR 516.6(a)(2)		
3.4.006	PER810	Time Sheets - Employee (non-student)	4		4	40 TAC 815.106(i)		
3.4.006	PER820	Time Sheets and Attendance Forms - Student Workers	FE+4		FE+4	40 TAC 815.106(i); 34 CFR 675.19		
3.4.007	PER830	Leave Requests - Employee	FE+3		FE+3			

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			Agency	Storage	Total				
3.4.001	PER840	Accumulated Leave Adjustment Reports	FE+3		FE+3				
3.4.008	PER850	Sick Leave Pool Documentation	FE+3		FE+3				

Retention Codes (Field 7)				Archival Codes (Field 8)	
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RSK = Risk Management

5.4.013	RSK110	Disaster Preparedness, Emergency Response, and Recovery Plans	US		US				
5.4.002	RSK120	Evacuation Plans	US		US				
5.4	RSK130	Institutional Biosafety Committee (IBC) Minutes	PM		PM	I			
5.1.013	RSK140	Insurance Policies	AC+4		AC+4	O	AC=Expiration or termination of policy according to its terms.		
5.4.001	RSK160	Accident and Incident Reports (and Related Documentation)	CE+5		CE+5		29 CFR 1904.33 NOTE: The Texas Department of Insurance retains copies of the reports submitted to it for 50 years		
5.6	RSK170	Vehicle Accident Records	FE+3		FE+3				
5.4.011	RSK180	Visitor Control Registers / Access Logs	3		3				
5.4.010	RSK210	Material Safety Data Sheets	AC		AC		AC=After sheets are updated or hazardous chemical no longer stored by agency, as applicable.		

Retention Codes (Field 7)	Archival Codes (Field 8)
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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 ONLY Amend. No.	
			Agency	Storage	Total					

5.4.003	RSK220	Safety Inspection Records	AC+3		AC+3	AC=Date of inspection; if inspection reveals a deficiency, then the date the deficiency is corrected. CAUTION: Does not include inspection reports of building construction. See FCL120 (5.2.028) for Building Construction Contract & Inspection Records.		
5.4	RSK230	Fire Safety Management	US+5		US+5	29 CFR 1910 (L)		
5.4.004	RSK240	Fire Marshal Orders	AC+3		AC+3	AC=Date of inspection; if inspection reveals a deficiency, then the date the deficiency is corrected.		
5.4	RSK300	Compliance Reporting - Environment: Federal, State, Local Governments	AC+10		AC+10	AC=Expiration of permit.		
5.4	RSK310	Indoor Air Quality - Testing, Monitoring, & Remediation	40		40	29 CFR 1910.1020		
5.4.008	RSK320	Hazard Communication Plans	US+5		US+5	Texas Health and Safety Code, Section 502.009(g); 25 TAC 295.1-13; TSLAC 5.4.008.		
5.4.007	RSK330	Hazardous Materials - Training	5		5	Texas Health and Safety Code 502.009(g)		

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



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2. Agency Code 754		3. Agency Name Texas State University-San Marcos								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title			7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total		9. Remarks			

5.4	RSK335	Hazardous Materials - Manuals, Policies, Procedures, Signage	US+5		US+5				
5.4	RSK340	Hazardous Materials Management Records	30		30		29 CFR 1910 Subpart H		
5.4	RSK345	Hazardous Materials - Remediation Records	40		40		29 CFR 1910.1020		
5.4	RSK350	Hazardous Materials - Exposure / Survey Forms	AC+30		AC+30		AC=Separation from the University. 29 CFR 1910.20		
5.4.008	RSK360	Chemical Hygiene Plan	US+5		US+5		29 CFR 1910.1020;		
5.4.009	RSK365	Chemical Lists & Inventories	30		30		Texas Health and Safety Code, Section 502.005(d); 25 TAC 295.11(i)(1)(A); TSLAC 5.4.009.		
5.4	RSK370	Water & Wastewater Permit Logs / Registers	PM		PM	I	TSLAC Local Schedule "Utility Services" 5025-13.		
5.4	RSK375	Water & Wastewater Records	AC+5		AC+5		AC=After completion of permit, report, compliance actions, analysis, etc. 30 TAC 290.46(f)(3); 30 TAC 290.112(4); 30 TAC 312.47(a) & (b); 30 TAC 305.125 (11)(B); 30 TAC 319.7.		
5.4	RSK410	Biosafety - Manuals, Policies, Procedures, Signage	US+5		US+5				

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



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2. Agency Code 754		3. Agency Name Texas State University-San Marcos						
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			Agency	Storage	Total			

5.4.007	RSK420	Bloodborne Pathogens - Training	5		5	25 TAC 96; 29 CFR 1910.1030(h)(2)(ii); Texas Health and Safety Code 502.009(g)		
5.4	RSK430	Bloodborne Pathogens - Exposure Control Plan	US+5		US+5	25 TAC 96.202; 29 CFR 1910.1030		
5.4	RSK440	Bloodborne Pathogens - Exposure/Incident/Injury Records	AC+30		AC+30	AC=Student or employee separation from the University. 29 CFR 1910.1030(h)(5)(iii); 29 CFR 1910.1020(d)(1)(ii)		
5.4	RSK450	Biohazard Incident Emergency Response	US+5		US+5			
5.4	RSK470	Biowaste Materials Management	30		30	29 CFR 1910 Subpart H; 25 TAC 330.1219; 30 TAC 330.1219		
3.1	RSK610	Medical Records: Employee Accommodation (FMLA & ADA)	AC+10		AC+10	AC=Termination of employment. Medical Liability Act guidelines; 22 TAC 165; By law - Health and Safety Code, Section 241.103; 29 CFR 825.500.		
3.1	RSK620	Medical Records: Surveillance & Exposure (Employee)	AC+30		AC+30	AC=Termination of employment. 29 CFR 1910.1020(d)(1)(ii)		
3.1	RSK630	Medical Records: Workers' Compensation (Employee)	AC+30		AC+30	AC=Termination of employment. 29 CFR 1910.1020(d)(1)(ii)		

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



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2. Agency Code 754		3. Agency Name Texas State University-San Marcos						
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			Agency	Storage	Total			

RSP = Research and Sponsored Programs

4.7.008	RSP100	Sponsored Programs Grant Contracts and Accounting Records	AC+4		AC+4	O	AC=date of submission of the final expenditure report. OMB Circular A-110, individual grant terms, and internal audit requirements. CAUTION: Retention requirements may vary depending on the specific federal funding agency. Agencies must ensure that records are retained for the appropriate retention period.		
4.7.008	RSP110	Sponsored Programs Grant Research Activity	AC+4		AC+4	O	AC=date of submission of the final expenditure report. OMB Circular A-110, individual grant terms, and internal audit requirements.		
4.1.002	RSP200	Institutionally Funded Faculty Research Grant Records	FE+3		FE+3	O	FE=End of the fiscal year in which the grant ended + 3 years (FE+3).		
	RSP300	Institutional Review Board (IRB) Minutes	5		5	I			
	RSP310	Institutional Review Board (IRB) Research Records	AC+3		AC+3	I	AC = completion of research.		

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 Univ Archives O – Review by Univ Archivist



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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 ONLY Amend. No.
			Agency	Storage	Total				

4.7.008	RSP800	Non-Research Grant Records	AC or FE+3, whichever is longer.		AC or FE+3, whichever is longer.	AC=Completion of the grant plus the length of time required by the grant's terms. If no terms are specified or if the grant requires less than a 3-year retention, records should be retained through the end of the fiscal year in which the grant ended + 3 years (FE+3). O Some records are historical and require preservation; contact the University Archivist for assistance. CAUTION: Retention requirements may vary depending on the specific federal funding agency. Agencies must ensure that records are retained for the appropriate retention period.		
	RSP900	Non-Funded Grant Proposals	AC+3		AC+3	AC=Date of denial.		

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



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Records Retention Schedule

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2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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 ONLY Amend. No.
			Agency	Storage	Total				

RTN = Radio and Television Station(s)

4.	5.	6.	7.			8.	9.	10.	11.
Records Series Item No.	Agency Item No.	Record Series Title	Agency	Storage	Total	Archival	Remarks	106 No.	TSLAC ONLY Amend. No.
	RTN110	Radio and Television License Records	AC+5		AC+5	I	AC=Until the license is superseded, expired, or canceled. FCC Bulletin EB-18FM September 2009 Edition, Section I.A..		
	RTN120	Daily Broadcast Logs and Station Records	2		2	O	FCC Bulletin EB-18FM September 2009 Edition, Section 1B.		
	RTN130	Chief Operator Records	AC+2		AC+2	O	AC=After completion of term / when superseded. FCC Bulletin EB-18FM September 2009 Edition, Section I.C.		
	RTN140	Public Inspection File	2		2	O	FCC Bulletin EB-18FM September 2009 Edition, Section I.F.		

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



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2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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 ONLY Amend. No.
			Agency	Storage	Total				

SAD = Students – Academic Departments

Records Series Item No.	Agency Item No.	Record Series Title	Agency	Storage	Total	Archival	Remarks	106 No.	TSLAC ONLY Amend. No.
	SAD100	Class Registration Lists and Course Status Records	AC+1		AC+1		AC=End of semester. TSLAC Local Schedule JC 3725-04		
	SAD150	Classroom Scheduling Records	AV		AV		TSLAC Local Schedule JC 3900-06;		
	SAD200	Examinations, Tests, Term Papers, and Homework Records	AC+2		AC+2		AC=End of semester. Provost: University policy states that students have 2 years to contest a grade.		
	SAD300	Faculty Grade Books	AC+2		AC+2		AC=End of semester. Recommendation of Provost; TSLAC Local Schedule JC 3725-06(b).		
	SAD350	Request for Change of Final Grade / Appeals	AC+1		AC+1		AC=Decision on the request. TSLAC Local Schedule JC 3725-06(d)		
	SAD400	Course & Faculty Evaluations (tenure track faculty)	AC+2		AC+2		AC=Date of grant or denial of promotion in tenure track. TSLAC Local Schedule JC 3850-06.		
	SAD450	Course & Faculty Evaluations (non-tenure track faculty)	AC+3		AC+3		AC=After course is completed. TSLAC Local Schedule JC 3850-06.		
	SAD500	Student Files - Departmental / Program Records (Undergraduate)	AC+2		AC+2		AC=Student separation from the department or University. Recommendation of Provost; TSLAC Local Schedule JC 3725-06.		

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



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2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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 ONLY Amend. No.
			Agency	Storage	Total				

4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Agency	7. Storage	7. Total	8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
	SAD501	Student Files - Departmental / Program Records (Undergraduate) - Accredited Program Requirements	AC+3		AC+3		AC=Student separation from the department or University. Recommendation of Provost; TSLAC Local Schedule JC 3725-06. AC+3 retention required by accredited academic programs such as Journalism.		
	SAD550	Student Files - Departmental / Program Records (Graduate)	AC+6		AC+6		AC=Student separation from the department or University. Graduate students have 6 years to complete their degree.		
	SAD600	Student Teaching - Application File	AC+5		AC+5		AC=End of semester in which the student completed the Student Teaching exercise. AACRAO Schedule C (attributed).		
	SAD650	Student Teaching - Final Evaluations and Certification Recommendation	5		5		Benchmarking of other teaching programs in Texas show many have adopted a 5-year retention.		

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



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Records Retention Schedule

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2. Agency Code 754		3. Agency Name Texas State University-San Marcos						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total	9. Remarks		

SAP = Students – Academic Progress

	SAP100	Academic Records / Transcripts	PM		PM	Records are permanent and require preservation and vital record protection. AACRAO Schedule C; TLSAC Local Schedule JC 3725-11.		
	SAP120	Final Grade Rosters	PM		PM	Records are permanent and require preservation and vital record protection. AACRAO Schedule C; TSLAC Local Schedule JC 3725-06.		
	SAP130	Change of Grade Forms	PM		PM	Records are permanent and require preservation and vital record protection. AACRAO Schedule C.		
	SAP140	Enrollment Correction Appeals	PM		PM	Records are permanent and require preservation and vital record protection.		
	SAP210	12th Day Class Rosters (4th Day Class Rosters-Summer)	FE+3		FE+3	TSLAC Local Schedule JC 3900-03.		

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



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2. Agency Code 754		3. Agency Name Texas State University-San Marcos						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total	9. Remarks		

	SAP220	Registration Withdrawal Forms & Authorizations	AC+3		AC+3	AC=End of academic term in which enrollment was terminated. AACRAO Schedule C; TSLAC Local Schedule JC 3725-12.		
	SAP310	Grade Reports (Report Cards to Students)	AC+1		AC+1	AC=Date distributed. AACRAO Schedule C		
	SAP320	Academic Certification Records	5		5	TSLAC Local Schedule JC 3725-11 (notes on transcripts are perm); benchmarking with other universities		
	SAP330	Independent Study Records	AC+2		AC+2	AC=After completion of the course. Provost: University policy states that students have 2 years to contest a grade.		
	SAP340	Theses and Dissertations Records	PM		PM	I Send to the Library for permanent retention in the collection.		
	SAP400	Academic Actions (Probation, Suspension, Reinstatement)	AC+5		AC+5	AC=Last attendance. AACRAO Schedule C; TSLAC Local Schedule JC 3725-01.		
	SAP410	Disciplinary Action Document – Not Resulting in Expulsion	AV		AV	AV=End of academic term to which the records related. TSALC Local Schedule JC 3900-02.		
	SAP430	Disciplinary Action Document – Resulting in Expulsion	3		3	TSALC Local Schedule JC 3900-02.		

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



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2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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 ONLY Amend. No.
			Agency	Storage	Total				

SCE = Students – Continuing Education

4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Agency	7. Storage	7. Total	8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
	SCE100	Continuing Education Records - For-Credit	AC+5		AC+5		AC=End of the academic term in which the course was offered. TSLAC Local Schedule JC 3725-03 / 3725-06.		
	SCE200	Continuing Education Records - Not-for-Credit	AC+5		AC+5		AC=End of the academic term in which the course was offered. TSLAC Local Schedule JC 3725-03 / 3725-06.		
	SCE300	Continuing Education Records - Non-Funded/Failed to Make	AC+1		AC+1		AC=End of the academic term in which the course was to be offered. TSLAC Local Schedule JC 3725-03.		

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



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			Agency	Storage	Total				

SFA = Student Financial Aid

4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Agency	7. Storage	7. Total	8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
	SFA100	Financial Aid Program - Institutional Program Files	AC+3		AC+3		AC=End of the award year. 39 CFR 668.24; FSA Recordkeeping & Disclosure		
1.1.002	SFA110	Financial Aid Program - Audit Reports	AC+7		AC+7		AC=Completion of audit report. TSLAC 1.1.002; 34 CFR 682.414; AACRAO Schedule H:1		
4.5.003	SFA120	Financial Aid Program - Annual Financial Reports	AC+6		AC+6		AC=End of award year; retention begins September 1 of odd-numbered years. TSLAC 4.5.003		
	SFA200	Financial Aid Program - Fiscal Records	AC+3		AC+3		AC=End of award year.		
	SFA210	Financial Aid Program - Fiscal Operations Report (FISAP) and FFEL and Direct Loan Reports	AC+3		AC+3		AC=End of the award year in which the report was submitted.		
	SFA300	Federal Campus-Based Aid	AC+3		AC+3		AC=End of award year in which the funds were awarded and disbursed. AACRAO Schedule H; 34 CFR 668.24(e); FSA Recordkeeping & Disclosure		

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



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			Agency	Storage	Total			

	SFA310	FFEL and Direct Loan	AC+3		AC+3	AC=End of award year in which the student last attended. AACRAO Schedule H; 34 CFR 682.414; FSA Recordkeeping & Disclosure		
	SFA320	Pell Grant	FE+3		FE+3	FE=End of fiscal year in which the award was given. AACRAO Schedule H; 34 CFR 668.24(e); FSA Recordkeeping & Disclosure		
	SFA330	Perkins Repayment Records	AC+3		AC+3	AC=Date loan assigned, cancelled, or repaid. AACRAO Schedule H:4; 34 CFR 668.24(e); FSA Recordkeeping & Disclosure		
	SFA335	Perkins IRS Skiptrace Information	AC+1		AC+1	AC=Date loan assigned, cancelled, or repaid. AACRAO Schedule H; 34 CFR 668.24(e); FSA Recordkeeping & Disclosure		

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



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			Agency	Storage	Total	9. Remarks		

	SFA340	Perkins Original Promissory Notes	AC		AC	AC=Date loan assigned, cancelled, or repaid. AACRAO Schedule H:4; 34 CFR 668.24(e); FSA Recordkeeping & Disclosure		
	SFA400	Institutionally Funded Grants & Scholarships - Applications	AC+3		AC+3	AC=End of award year. TSLAC Local Schedule JC 3750-01		
	SFA410	Institutionally Funded Grants & Scholarships - Recipient Lists	AV		AV	O		
	SFA420	Graduate Student Tuition Remission Records	AC+3		AC+3	AC=End of award year. Retention set to be same as financial aid awards in AACRAO Schedule H; 34 CFR 682.414; FSA Recordkeeping & Disclosure		
	SFA430	Tuition and/or Fee Waivers and Exemptions	AC+3		AC+3	AC=End of award year. Retention set to be same as financial aid awards in AACRAO Schedule H; 34 CFR 682.414; FSA Recordkeeping & Disclosure		

Retention Codes (Field 7)				Archival Codes (Field 8)			
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			Agency	Storage	Total				

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 ONLY Amend. No.
			Agency	Storage	Total				
	SFA500	Student Financial Aid Files - Paper Records	AC+3		AC+3		AC=End of award year the student last attended. 34 CFR 682.610; AACRAO Schedule H		
	SFA510	Student Financial Aid Files - Electronic	AC+5		AC+5		AC=End of award year. Retention meets departmental need and exceeds minimums set in 34 CFR 682.610; AACRAO Schedule H.		
	SFA515	Financial Aid Telephone Conversations	6 mos		6 mos		Per Legal Counsel		
	SFA520	Athletic Scholarship and Grant-In-Aid Award Records	AC+10		AC+10		AC=End of award year the student last attended. NCAA, NAIA, and SEC/ACC requirements dictate a 10-year retention for this series.		

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



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			Agency	Storage	Total				

SFP = Student - FERPA

	SFP100	FERPA (Family Educational Rights and Privacy Act)- Access Policies	US		US	TSLAC Local Schedule JC 3775-01.		
	SFP200	FERPA (Family Educational Rights and Privacy Act) - Student Access Waivers	AC		AC	AC=Until the waiver is terminated, the letters of recommendation are destroyed, or the records to which the waiver applies are disposed. AACRAO Schedule B: TSLAC Local Schedule JC 3775-03.		
	SFP300	FERPA (Family Educational Rights and Privacy Act) / PIA (Public Information Act) Records of Access to Information	AC		AC	AC = Life of the record(s) subject to the request(s) or 2 years, whichever is longer, to comply with Schedule JC and PIR requirements. AACRAO Schedule C, Note 3; 34 CFR 99 Subpart D Sec. 99.32(a); TSLAC Local Schedule JC 3775-02.		
	SFP400	FERPA (Family Educational Rights and Privacy Act) - Record Amendment Requests	2		2	TSLAC Local Schedule JC 3775-05.		

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



STATE OF TEXAS Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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 ONLY Amend. No.
			Agency	Storage	Total				
	SFP500	FERPA (Family Educational Rights and Privacy Act)- Protest of Record Statements	AC		AC		AC=As long as the record containing the contested information is maintained. TSLAC Local Schedule JC 3775-04; 34 CFR 99.21(c)(1)		

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



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SLR 105

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2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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 ONLY Amend. No.
			Agency	Storage	Total				

SGR = Student Graduation

4.	5.	6.	7.			8.	9.	10.	11.
Records Series Item No.	Agency Item No.	Record Series Title	Agency	Storage	Total	Archival	Remarks	106 No.	TSLAC ONLY Amend. No.
	SGR100	Graduation - Applications	AC+1		AC+1		AC=After completion of graduation events. AACRAO Schedule C; TSLAC Local Schedule JC 3725-07.		
	SGR200	Graduation - Authorizations	AC+5		AC+5		AC=After graduation or separation from university. AACRAO Schedule C; TSLAC Local Schedule JC 3725-07		
1.1	SGR300	Graduation - Diploma Administration	2		2				
	SGR400	Graduation - Lists (Registrar / Academic)	PM		PM		AACRAO Schedule C and Schedule E; TSLAC Local Schedule JC 3725-08.		
1.1	SGR500	Graduation / Commencement Records (Ceremony)	10		10	I			

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



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Records Retention Schedule

SLR 105

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2. Agency Code 754		3. Agency Name Texas State University-San Marcos								
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 ONLY Amend. No.	
			Agency	Storage	Total					

SHC = Student Health Center

	SHC110	Operational Permits, Licenses, and Certifications	AC+3		AC+3	AC=Expiration or cancellation of permit, license, or certification. Texas Local Schedule HR 4750-05.		
	SHC120	HIPAA Documentation	AC+6		AC+6	AC=Date of creation or date when last in effect, whichever is later. 45 CFR 164.530(j)(2)		
	SHC130	Medical Waste Management	3		3	30 TAC 330.1004(h)(4); Texas Local Schedule HR 4750-03; See TCEQ Regulatory Guidance, August 2007: Texas Regulations on Medical Waste.		
	SHC140	Documentation of Meningitis Education	2		2	Texas Education Code Chapter 51.Z, §51.9191(e)		
	SHC150	Healthcare Incident Reports	CE+3		CE+3	TAC 22 Chapter 11 §217.16		
	SHC160	Nurse Peer Review Programs	CE+3		CE+3	TAC 22 Chapter 11 §217.19		
	SHC161	Tracking of Nurse Errors	1		1	TSLAC 1.1.069 (Activity Reports); TAC 22 Chapter 11 §217.19(a)(7)		
1.1.057	SHC210	Patient Encounter Forms	AC+1		AC+1	AC=Entry into database.		
	SHC220	Patient Medical Records	AC+7		AC+7	AC=Last year of treatment provided by medical provider. 22 TAC 165 1(b)(1)		

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



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Records Retention Schedule

SLR 105
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2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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 ONLY Amend. No.
			Agency	Storage	Total				

1.1.069	SCH230	Patient Records Pick-up Log	1		1				
	SHC240	Patient X-Rays	7		7		42 CFR 482.26(d)(2); Texas Local Schedule HR 4800-25.		
	SHC250	Immunization Records and Forms	10		10		If minor, retention is 10 years or 21 st birthday, whichever is later. Local Schedule HR 4775-03.		
	SHC310	Laboratory: Test Requisitions	2		2		42 CFR 493.1105(1) and (3) – CLIA.		
	SHC320	Laboratory: Slides - Hematology (differential) and all others	2		2		42 CFR 493.1105; CLIA (no retention requirements stated).		
	SHC330	Laboratory: Tests - Pathology, Cytology, Histopathology	10		10		42 CFR 493.1105 (6) (CLIA).		
	SHC340	Laboratory: Proficiency Testing	2		2		42 CFR 493.1105 (4) (CLIA).		
	SHC410	Prescription Dispensation & Inventory Records	2		2		22 TAC 15 §309.6; 22 TAC 15 §295.13(e)(1)(A); Health and Safety Code, Section 481.075(f)(2) and 483.024.		
	SHC420	Drug Destruction Records	FE+3		FE+3		22 TAC 15 §303.3; Texas Department of State Health Services RRS.		
	SHC430	Prescription Dispensation & Inventory Records - Controlled or Dangerous Drugs	AC+2		AC+2		AC=date of the initial dispensing or the last refilling of the prescription, whichever date is later. Health and Safety Code 483.023		

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



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Records Retention Schedule

SLR 105
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2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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 ONLY Amend. No.
			Agency	Storage	Total				

4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Agency	7. Storage	7. Total	8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
	SHC440	Pseudoephedrine Sales Logs	2		2		Combat Methamphetamine Epidemic Act of 2005		
1.1.069	SHC450	Prescription Pick-Up Log	1		1				
4.1.002	SHC510	Student Insurance Billing Documents	FE+3		FE+3				
4.1.002	SHC520	Student Insurance Reports	FE+3		FE+3				
	SCH530	Student Health Insurance Waivers	AC+1		AC+1		<p>AC=end of semester for which the waiver applies.</p> <p>Retention note: These are not billing or financial records. These are requests for health insurance waivers from international students on non-immigrant visas, as outlined by UPPS 07.09.04. Waivers are requested each semester.</p>		

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



STATE OF TEXAS Records Retention Schedule

SLR 105

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2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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 ONLY Amend. No.
			Agency	Storage	Total				

SHO = Student Housing

4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Agency	7. Storage	7. Total	8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
5.1.001	SHO100	Housing Contracts - Student Contracts	AC+4		AC+4		AC=Student separation from campus housing. Per General Counsel.		
5.1.001	SHO110	Housing Contracts - Summer Reservations	AC+4		AC+4		AC=Expiration of contract. Per General Counsel.		
	SHO200	Student Housing Judicial Files	AC+2		AC+2		AC=Expiration of appeal. Per General Counsel.		
1.1.069	SHO300	Student Housing Rosters	1		1				

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



STATE OF TEXAS Records Retention Schedule

SLR 105

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2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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 ONLY Amend. No.
			Agency	Storage	Total				

SLI = Student Life

	SLI100	Student Organizations and Honor Societies	AC+3		AC+3	O	AC=End of semester for rosters, lists, events, and minutes. When superseded for by-laws and governing documents.		
	SLI200	Student Publications and Performances	AC+3		AC+3	O	AC=End of semester for rosters, lists, events, and minutes. When superseded for by-laws and governing documents.		

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



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Records Retention Schedule

SLR 105

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2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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 ONLY Amend. No.
			Agency	Storage	Total				

SMS = Student Admissions

4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Agency	7. Storage	7. Total	8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
	SMS100	Admissions - Incomplete Applications	AC+1		AC+1		AC=End of admission period / semester. AACRAO Schedule A, TSLAC Local Schedule JC 3700-01.		
	SMS200	Admissions - Students Enrolled	AC+5		AC+5		AC=Date of last attendance. AACRAO Schedule B; TSLAC Local Schedule JC 3700-01, 02.		
	SMS250	Admissions - Students Not Enrolled / Denied	AC+1		AC+1		AC=End of semester in which the student applied. AACRAO Schedule A.		
	SMS300	Admissions - International Students Enrolled	AC+5		AC+5		AC=Last attendance. 8 CFR 214.3(g); 22 CFR 62.10(h); Sec. 416 of the USA PATRIOT ACT; AARACO Schedule B.		
	SMS350	Admissions - International Students Not Enrolled / Denied	AC+1		AC+1		AC=End of admission period / semester. AACRAO Schedule A.		
	SMS400	Residency Affidavits & Forms	AC+5		AC+5		AC=Student separation from the University. AACRAO Schedule B.		
	SMS500	Admissions / Enrollment Report	PM		PM		TSLAC Local Schedule JC 3900-07; AACRAO Schedule E (by association).		

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 Univ Archives O – Review by Univ Archivist



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Records Retention Schedule

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2. Agency Code 754		3. Agency Name Texas State University-San Marcos								
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 ONLY Amend. No.	
			Agency	Storage	Total					

SRR = Student Recruitment and Retention

	SRR100	Student Recruitment Records	3		3	38 CFR 21.4209(f); TSLAC Local Schedule JC 3900-05.		
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SSV = Student Services

	SSV100	Client Records - ADA/Disability, Counseling, Psychological, and Psychiatric	AC+10		AC+10	AC=Last contact with client. TAC Rule 465.22 (d)(2).		
	SSV150	Client Records - Non-Medical Health Services	AC+7		AC+7	AC=Last contact with client (or retain until client reaches age 21, whichever is longer). 22 TAC 165.		
	SSV200	Job Fairs & Student Placement / Recruiting Records	FE+1		FE+1	Per Legal Counsel: EEOC requirements.		
	SSV250	Job Shadowing Program	AC+2		AC+2	AC=End of the semester in which the job shadowing took place; or 2 years after the student turns 18, whichever is longer. Per Legal Counsel: statute of limitations for personal injuries is 2 years.		

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



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Records Retention Schedule

SLR 105

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2. Agency Code 754		3. Agency Name Texas State University-San Marcos						
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 ONLY Amend. No.
			Agency	Storage	Total			

3.1.039	SSV300	Ombudsman Records – Student	AC		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.		
4.1.002	SSV400	Recreation – Facility/Program Membership Forms	FE+3		FE+3			
1.1.069	SSV410	Recreation – Attendance and Use Logs	1		1			
	SSV420	Recreation – Activity Release Forms	AC+4		AC+4	AC=Conclusion of event, or end of the last semester in which an individual participated. TSLAC 5.1; Per General Counsel; based on LEG500 - Waivers: Hold Harmless, Liability, and Release Records.		

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



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Records Retention Schedule

SLR 105

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2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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 ONLY Amend. No.
			Agency	Storage	Total				

STS = Student Testing

4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Agency	7. Storage	7. Total	8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
	STS100	National Exams - Scores (Entrance Exams)	AC+5		AC+5		AC=Last attendance. AACRAO Schedule C.		
4.2.002	STS200	National Exams - Test Administration	FE+3		FE+3		TSLAC 4.2.002 (Cash Receipts)		
	STS300	State Required Academic Assessment Records (THEA: Texas Higher Education Assessment)	AC+5		AC+5		AC=Student separation from the University. AACRAO Schedule B		
	STS400	Credit by Exams (AP, CLEP, Departmental, IB, SAT II)	AC+5		AC+5		AC=Last attendance. AACRAO Schedule C; TSLAC Local Schedule JC 3725-02.		
	STS500	Institutional Exams (Journalism, Math)	AC+5		AC+5		AC=Date of last attendance. AACRAO Schedule C		

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



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2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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 ONLY Amend. No.
			Agency	Storage	Total				

STU = Student Administration

4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Agency	7. Storage	7. Total	8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
	STU100	Course Registration and Status Records	AC+1		AC+1		AC=End of Semester. TSLAC Local Schedule JC 3750-04; AACRAO Schedule C		
	STU110	Administrative Course Change Forms (Adds/Drops)	1		1		AACRAO Schedule C		
	STU120	Holds & Encumbrances (Academic)	AC		AC		AC=Date of release. TSLAC Local Schedule JC 3725-09		
	STU130	Registration Cancellations	FE+3		FE+3		FE=Fiscal year end.		
	STU140	Student Records - Military Veterans / VA Files	AC+5		AC+5		AC=Student separation from the University. AACRAO Schedule C; VA Retention Requirements. 38 CFR §21.4209(f)		
	STU150	Internship Program Records	AC+5		AC+5		AC=End of the semester in which the internship took place.		
	STU210	Personal Data Update / Name Change Records	AC+2		AC+2		AC= Last enrollment or last update (whichever is longer) TSLAC Local Schedule JC 3725-10		
3.1.018	STU220	Grievance Records - Student	AC+2		AC+2		AC=Final decision on the grievance.		
	STU310	Routine Requests: Transcript Requests	1		1				
3.1.038	STU320	Public Access / Non-Disclosure Form (Student Privacy Election)	US		US		Texas Public Information Act, Government Code 55.2024		

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



Texas
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2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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 ONLY Amend. No.
			Agency	Storage	Total				
	STU410	Non-University Student Records	AC+3		AC+3		AC=Student separation from program.		

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 Univ Archives
O – Review by Univ Archivist



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2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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 ONLY Amend. No.
			Agency	Storage	Total				

SVC = Support Services

5.1.014	SVC110	Procedure Manuals / Guidelines / Instructions	US+1		US+1			
5.1.011	SVC120	Photocopier and Telefax Usage Logs & Reports	AV		AV			
5.1.005	SVC130	Postage & Shipping Records	FE+3		FE+3			
5.1.007	SVC140	Requisitions for In-House Copy / Printing Services	AC		AC	AC=After completion and delivery of the copy/print order.		
1.1.057	SVC145	Printing Estimates - Campus Printing Services	AC		AC	AC=After estimate has expired (30 days).		
5.1.012	SVC150	Fee Schedules / Price Lists	US+3		US+3			
5.1.015	SVC160	Mail / Package Tracking Records	1		1			
5.1.003	SVC170	Delivery Reports	2		2			
5.3.009	SVC210	Requests for Information (RFI / RFB / RFP / RFQ)	AC		AC	AC=Date of direct purchase, issuance of request for bids, or decision to not proceed with the procurement, as applicable.		

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



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Records Retention Schedule

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2. Agency Code 754		3. Agency Name Texas State University-San Marcos						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total	9. Remarks		

5.3.007	SVC220	Bid Documentation	FE+3	FE+3	O	CAUTION: If a formal written contract is the result of a successful bid or request for proposal, the successful bid or request for proposal and its supporting documentation must be retained for the same period as the contract. See FCL100 (5.1.001 and 5.2.028) for Building Construction Contract & Inspection Records.		
5.3.004	SVC230	Internal Requests for Supplies & Equipment	AV	AV				
5.3.008	SVC240	Purchasing Logs	FE+3	FE+3				
5.3.005	SVC250	Shipping Lists / Packing Slips	AV	AV				
5.3.002	SVC260	Freight Bills Paid	FE+3	FE+3				
5.3.003	SVC270	Freight Claims	AC+2	AC+2		AC=Resolution of claim.		
5.5.004	SVC310	System Activity Reports	AV	AV				
5.5.003	SVC320	Station Activity Report	AV	AV				
5.5.002	SVC330	Telephone - Long Distance Log	AV	AV				
5.5.001	SVC340	Telephone - Long Distance / Billing Detail	FE+3	FE+3				
5.5.007	SVC350	Disputed Call Documentation / Personal Call Reimbursement	FE+3	FE+3				

Retention Codes (Field 7)	Archival Codes (Field 8)
AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	I – Transfer to Univ Archives O – Review by Univ Archivist
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PM – Permanent US – Until Superseded	



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2. Agency Code **754** 3. Agency Name **Texas State University-San Marcos**

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 ONLY Amend. No.
			Agency	Storage	Total				

1.1.057	SVC410	Off-Campus Shuttle Bus Schedules	AC+3		AC+3	O	AC=After completion of the semester schedule.		
1.1	SVC420	TxTram/ Campus Shuttle Bus - History	5		5	O			

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



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2. Agency Code 754		3. Agency Name Texas State University-San Marcos								
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 ONLY Amend. No.	
			Agency	Storage	Total					

UAD = University Administration

1.1.058	UAD110	Board of Regents - Minutes and Resolutions	PM		PM	I	One copy of all Board minutes should be sent directly to University Archives for long-term retention. All departmental copies are considered convenience copies.		
1.1.004	UAD120	Legislative Budget Requests [Biennial]	AC+6		AC+6	I	AC=September 1 of odd-numbered calendar years. ARCHIVES NOTE: The archival requirement is met by sending the required copies of the requests 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.		

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



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Records Retention Schedule

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2. Agency Code 754		3. Agency Name Texas State University-San Marcos						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total	9. Remarks		

1.1.070	UAD210	Academic Policies	PM		PM	I	Records are permanent and require preservation; contact the University Archives to transfer superseded policies.		
1.1.071	UAD220	Academic Policies - Working Files	AC+3		AC+3	O	AC=Completion of new / updated policy. Some records have historical value and require preservation; contact the University Archives after the active retention period has expired.		
1.1.070	UAD230	Policies & Procedures - Approved UPPS / Operating Letters	AC+3		AC+3	I	AC=Completion or termination of program, rules, policies, or procedures. Records are archival and require preservation; contact the University Archives after the active retention period has expired.		
1.1.071	UAD240	Policies & Procedures - Working Files	AC+3		AC+3	O	AC=Completion or termination of program, rules, policies, or procedures. Some records have historical value and require preservation; contact the University Archives after the active retention period has expired.		

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



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2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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 ONLY Amend. No.
			Agency	Storage	Total				

1.1.068	UAD300	Reports – Agency Performance Measures	AC+6		AC+6	O	AC = September 1 of odd-numbered calendar years.		
1.1.068	UAD310	Reports - Academic Statistics	PM		PM	I	AACRAO Schedule E; TSLAC Local Schedule JC 3900-07.		
1.1.066	UAD320	Reports - Annual or Biennial Agency Reports to Board	AC+6		AC+6	I	AC=September 1 of odd-numbered calendar years. ARCHIVES NOTE: The State 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.		
1.1.065	UAD330	Reports - External Research & Surveys	AC		AC	O	AC=Until report has fulfilled the purpose for which it was created.		
1.1	UAD340	Reports - Institutional Survey and Reporting (Required by Outside Entities)	PM		PM	I			

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



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2. Agency Code 754		3. Agency Name Texas State University-San Marcos						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total	9. Remarks		

1.1.066	UAD350	Reports - State Legislative Reporting Requirements	AC+6		AC+6	I	AC=September 1 of odd-numbered calendar years. ARCHIVES NOTE: The archival requirement is met by sending the required copies of the reports to the Texas State Publications Depository Program, Texas State Library and Archives Commission.		
	UAD355	Reports: Student Perceptions of Instruction (SPI)	2		2		House Bill 2504 (2009)		
	UAD410	Accreditation Reports – SACS	PM		PM	I	TSLAC Local Schedule JC 3800-01		
	UAD420	Accreditation Reports – Professional & Program Accreditation	PM		PM	I	TSLAC Local Schedule JC 3800-01		
	UAD430	Accreditation Records - Planning Records	AC+1		AC+1	O	AC=After subsequent accreditation. TSLAC Local Schedule JC 3800-02		
1.1	UAD440	Cooperative Programs Records	PM		PM	I			
1.1	UAD510	Awards Records - Institutional and Individual	PM		PM	I			

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



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2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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 ONLY Amend. No.
			Agency	Storage	Total				

1.1.024	UAD520	Institutional Planning Records	AC+5		AC+5	O	AC=Term of president. Some records have historical value and require preservation; contact the University Archives after the active retention period has expired.		
1.1	UAD530	Event Planning Records - University Special Events	AC+2		AC+2	O	AC=Completion of the event. Some records have historical value and require preservation; contact the University Archives after the active retention period has expired.		
1.1	UAD540	Gifts Received	PM		PM	I			
1.1	UAD550	Lecture Series Records	PM		PM	I			

Retention Codes (Field 7)				Archival Codes (Field 8)			
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4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total	9. Remarks			

UPD = University Police Department

1.1	UPD	Record Series Title	Agency	Storage	Total	8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
	UPD110	Campus Crime Reporting (Clery Act)	7		7	I	20 U.S.C. 1092(f), Jeanne Clery Disclosure of Campus Security Policy and Campus Crime Statistics Act ("Clery Act").		
	UPD120	Annual Reports	PM		PM	I	Local Schedule PS 4025-01.		
	UPD130	Profiling Records	CE+3		CE+3		Based on TSLAC 1.1.064.		
	UPD200	Case Cards (Incoming Calls)	2		2		TSLAC Local Schedule PS 4125-01.		
	UPD210	Communications (Dispatch) Logs	2		2	O	TSLAC Local Schedule PS 4100-05.		
	UPD220	Radio Log	1		1		TSLAC Local Schedule PS 4100-06.		
	UPD230	Case Records - without Arrest	2		2		TSLAC Local Schedule PS 4125-01.		
	UPD240	Case Records - with Arrest Report	75		75		TSLAC Local Schedule PS 4125-02.		
	UPD260	TCIC/TLETS Stolen Property Records	2		2		TSLAC Local Schedule PS 4175-12.		

Retention Codes (Field 7)				Archival Codes (Field 8)			
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2. Agency Code 754		3. Agency Name Texas State University-San Marcos						
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			Agency	Storage	Total	9. Remarks		

	UPD270	Accident Reports	AC+3		AC+3	AC=date of accident if no claim; if claim is filed, date of settlement or denial of claim. For minors, then AC=date minor reaches majority age. TSLAC Local Schedule PS 4150-01 (2 years); GR1000-20a (3 years if no claim, 3 years after settlement of claim or denial of claim); GR1000-20b (Date minor reaches majority age + 3 years if no claim, 3 years after settlement or denial of claim). By law – Civil Practice and Remedies Code, Section 16.001.		
1.1.069	UPD280	Facilities Access Logs (i.e. routine facilities checks)	1		1			
1.1.064	UPD290	PSO Logs / Bobcat Bobbies	CE+3		CE+3			
5.6.009	UPD400	Parking Decal and Permit Records	FE+3		FE+3	TSLAC Local Schedule JC 3900-04.		

Retention Codes (Field 7)				Archival Codes (Field 8)	
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2. Agency Code 754		3. Agency Name Texas State University-San Marcos							
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 ONLY Amend. No.
			Agency	Storage	Total				
	UPD900	Texas Commission on Law Enforcement Officers Standards and Education (TCLEOSE)	AC+5		AC+5		AC=Employee separation. Local Schedule PS (4325-03), 37 TAC 217.7(g), and Section 1701.451 of the Texas Occupations Code.		

Retention Codes (<i>Field 7</i>)				Archival Codes (<i>Field 8</i>)	
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