



July 15, 2016

Dr. Brian McCall  
Chancellor  
Texas State University System, Lamar State College - Orange  
200 E. 10th Street  
Thomas J. Rusk Building, Suite 600  
Austin, TX 78701

RE: Agency records retention schedule approved for use

State and Local  
Records Management

Dear Dr. McCall:

P.O. Box 12927  
Austin, Texas  
78711.2927

Your agency's records retention schedule is approved for use as of July 12, 2016. Your currently approved records retention schedule is available on our website at <https://www.tsl.texas.gov/slrn/state/schedules.html>. Please ensure all old copies of the schedule are superseded with this recertified copy.

4400 Shoal Creek Blvd.  
Austin, Texas  
78756

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

[www.tsl.texas.gov](http://www.tsl.texas.gov)

Each agency schedule must be reviewed, updated and submitted for recertification annually for the first two years after the initial approval of the schedule and every five years thereafter. The deadline for submission of your schedule for its next recertification is the last working day of **July 2021**.

*Commission Chairman*  
Michael C. Waters

During a certification period changes may need to be made to your schedule. State regulations (13 TAC §6.4) also allow for the submission of amendments to the retention schedule as needed to keep the information in the schedule current. If you are not familiar with the amendment process, or if you have any other questions, please contact the Government Information Analyst assigned to your agency, Erica Wilson, at 512-463-6627 or [ewilson@tsl.texas.gov](mailto:ewilson@tsl.texas.gov).

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

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

*Director and Librarian*  
Mark Smith

Sincerely,

*Assistant State Librarian*  
Edward Seidenberg

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

Craig Kelso  
Director and State Records Administrator

*Preserving yesterday,  
informing today,  
inspiring tomorrow.*

cc: State Auditor, State Archivist, Brian McCall

R01.758/787



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 787

Agency Name Lamar State College-Orange

(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 [Handwritten Signature]

Name (Print or type) Dr. Brian McCall

Date 6-13-14

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 [Redacted]

Name (Print or type) [Redacted]

Date [Redacted]

Not Required at This Time

Texas State Library and Archives Commission

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

Signature [Handwritten Signature]

Name (Print or type) Donna Osborne

Date 7/12/16

Cert/Recert No. 4 Amendment No. -

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## CAUTION

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

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





# STATE OF TEXAS

## Records Retention Schedule

**SLR 105**

*Form SLR 105C must accompany this form.*

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2. Agency Code <b>787</b>		3. Agency Name <b>Lamar State College-Orange (2014)</b>							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks (2014 recertification)	10. 106 No.	11. TSLAC ONLY Amend. No.
			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 (2014 recertification)	106 No.	TSLAC ONLY Amend. No.
	1	Academic Calendars	5		5				
	2	Academic Grievance Records	AC+3		AC+3		AC=After Closure+3 REF: 3850-01JC		
	8	Accreditation Records	PM		PM	I	I=In-school archives		
	53	Class Schedule Change Requests	AV		AV				
	54	Class-Course Information and Description	US		US				
	58	Consent/Release Forms	AV		AV				
	65	Curriculum Records	AV		AV				
	72	Deeds and easements	PM		PM				
	110	Faculty Activity and Assignment Records	3		3		Ref: 3850-02JC		
	111	Faculty Development Leave Records	AC+3		AC+3		AC=Approval or Denial of Applications Ref: 3850-03JC		
	112	Faculty Grant Records	AC+3		AC+3		AC=Receipt of Grant Ref: 3850-4JC		
	125	Grant Applications and Proposals	FE+3		FE+3				
	152	Liability Release Forms/Records	PM		PM				
	193	Promotion and Tenure Records	AC+2		AC+2		AC=Approval or Denial of Promotion or Tenure Ref: 3850-06JC		
	242	Statistical Report	PM		PM		Ref: 3900-07JC		
	244	Students – 4th and 12th Class Day Reports	5		5		Buckley Amendment Confidential		
	245	Students – Academic Progress Records	AC+5		AC+5		Buckley Amendment Confidential AC=Graduation or Last Day of Attendance		

SLR 105  
Rev. 6/6/2015

**Retention Codes (Field 7)**

AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value  
 CE – Calendar Year End FE – Fiscal Year End  
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**Archival Codes (Field 8)**

I – Transfer to School Archives O – Review by School 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 (2014 recertification)	10. 106 No.	11. TSLAC ONLY Amend. No.
	246	Students – Academic Records		PM		PM	Buckley Amendment Confidential. Record retention period based on AACROA guidelines for academic records.		
	247	Students – Academic Status Reports		PM		PM	Buckley Amendment Confidential		
	248	Students – Add/Drop Class Records		AC+5		AC+5	Buckley Amendment Confidential AC=Graduation or Date of Last Attendance.		
	249	Student Advisement		AC+5		AC+5	AC=Graduation or Date of Last Attendance		
	250	Students-Applications/Admissions, Rejected		2		2	Buckley Amendment Confidential		
	251	Students- Apprenticeship Records		5		5	29 CFR 30.8 (e) 5 Year Retention unless otherwise stipulated by accreditation requirements.		
	252	Students – Attendance Records		5		5	Buckley Amendment Confidential		
	253	Students – Authority to Inspect Records		AV		AV			
	254	Students – Change of Status Forms		AC+5		AC+5	Buckley Amendment Confidential AC=Graduation or Last Date of Attendance.		
	255	Students – Class Schedules		5		5	Retention period based upon AACROA Guidelines.		
	256	Students – Comprehensive Exams		AV		AV			

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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 (2014 recertification)	10. 106 No.	11. TSLAC ONLY Amend. No.
	257	Students – Course Outlines and Descriptions	FE+7		FE+7				
	258	Students – Degree Application	AC+1		AC+1		Buckley Amendment Confidential AC=Graduation or Withdrawal. Retention based upon AACRAO Guidelines.		
	259	Students – Degree Plans	PM		PM		Buckley Amendment Confidential Record Retention based on AACRAO Guidelines.		
	260	Students – Disciplinary Records	AC+7		AC+7		Buckley Amendment Confidential AC=Graduation or Last Date of Attendance.		
	261	Students – Enrollment Statistics	PM		PM		Retention period based on AACRAO Guidelines for Statistical Reports		
	262	Students – Enrollment Verification	AC+1		AC+1		Buckley Amendment Confidential Retention based on AACRAO Guidelines.		
	263	Students – Financial Aid Records	FE+5		FE+5				
	264	Students – Grade Books	1		1		Retention based on University Policy.		
	265	Students – Grade Change Forms	PM		PM		Buckley Amendment Confidential Retention period based on AACRAO Guidelines.		

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	266	Students – Grade Reports	1		1		Buckley Amendment Confidential		
	267	Students – Grade Sheets	PM		PM		Buckley Amendment Confidential Retention based on AACRAO Guidelines.		
	268	Students – Graduation Status and Rankings	PM		PM		Buckley Amendment Confidential Retention base on AACRAO Guidelines.		
	269	Students – ID Photo and Database	5		5				
	270	Students – Loan Journals or Registers	FE+5		FE+5		AC=1 Sept +5		
	271	Students – Name Change Requests	AC+5		AC+5		Buckley Amendment Confidential AC=Date of Request Retention based on AACRAO Guidelines.		
	272	Students – Non-Disclosure of Information Request	AC+1		AC+1		Buckley Amendment Confidential AC=Date of Request Retention period based on AACRAO Guidelines.		
	273	Students – Placement and Career Counseling	AC+5		AC+5		AC=Graduation or Date of Last Attendance Buckley Amendment Confidential		
	274	Students – Promissory Notes – Financial Aid	AC+3		AC+3		AC=Debt Retired.		
	275	Students – Recognition (Awards, etc.)	AC+3		AC+3		AC=Graduation or Date of Last Attendance		

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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 (2014 recertification)	10. 106 No.	11. TSLAC ONLY Amend. No.
	276	Students – Recruitment Records	AC+1		AC+1		Buckley Amendment Confidential AC=Graduation or Last Date of Attendance		
	277	Students – Reports	AV		AV		Buckley Amendment Confidential		
	278	Students – Scholarship Records	AC+3		AC+3		Buckley Amendment Confidential AC=Graduation or Date of Last Attendance. Retention based on AACRAO Guidelines.		
	279	Students – Scores and Reports (External)	AC+5		AC+5		Buckley Amendment Confidential AC=Graduation or Last Date of Attendance. Retention based on AACROA Guidelines.		
	280	Students – Student Organizations	AV		AV				
	281	Students – Suspensions/Expulsions	PM		PM		Buckley Amendment Confidential		
	282	Students – Test Materials (External)	US		US				
	283	Students – Tests, Academic	AC+1		AC+1		Buckley Amendment Confidential AC=End of Semester		
	284	Students – Transcript Requests	AC+1		AC+1		Buckley Amendment Confidential AC=Date Submitted. Retention based on AACROA Guidelines.		
	285	Students – Transcripts	PM		PM		Buckley Amendment Confidential Retention based on AACROA Guidelines.		

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	286	Students – Veteran Affairs Records	AC+3		AC+3		AC=Graduation or Date of Last Attendance Buckley Amendment Confidential. Retention based on AACROA Guidelines.		
	287	Students – Withdrawal/Reinstatement	AC+3		AC+3		AC=Graduation or Date of Last Attendance Buckley Amendment Confidential. Retention based on AACROA Guidelines.		
	288	Students – Work Study Records	FE+5		FE+5		Retention period base on Federal Requirements for Pell Grants and other campus based programs.		
1.1	52	Class Roll Summary	5		5				
1.1	153	Library Circulation Records	AV		AV		JC3925-03		
1.1.	154	Library Statistical Compilations	AV		AV				

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			Agency	Storage	Total				

1.1	225	Research Applications	AC		AC		AC=Completion of study or research		
1.1	226	Research Data	AC		AC		AC=Completion of study or research		
1.1.002	27	Audits	AC+7		AC+7		AC=Publication or release of final audit findings. They record copy of any audit performed by the State Auditor's Office is retained permanently by the agency		
1.1.004	150	Legislative Appropriations Requests (Biennial Budget Report)	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.  I=In-school archives		

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1.1.006	55	Complaint File	AC+2		AC+2		AC=Final disposition of complaint CAUTION: If a complaint becomes the subject of litigation, it must be included in and is subject to the minimum retention period of item number 1.1.048		
1.1.007	61	Correspondence - Administrative	4		4	O	ARCHIVES NOTE: Only the administrative correspondence of executive staff, board or commission members, division directors and program heads require archival review. Contact the school Archives when these records have met their retention periods. CAUTION: This records series and item number should be used only for correspondence that is not included in or directly related to another records series on the agency's approved schedule.  O – Review by School Archivist		
1.1.008	62	Correspondence - General	2		2				
1.1.010	76	Directives	US+1		US+1				

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1.1.013	145	Calendars, Appointment and Itinerary Records	CE+1	CE+1	O	<p>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 State Archives when these records have met their retention periods.</p> <p>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.</p> <p>O – Review by School Archivist</p>	
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1.1.014	147	Legal Opinions and Advice	AV	AV	I	CAUTION: Does not include legal opinions or advice rendered on a matter in litigation or with regard to pending litigation. SEE item number 1.1.048. I=In-school archives		
1.1.019	200	Public Relations Records	2	2	I	I=In-school archives		
1.1.020	169	Public Information Requests - Not Exempted	AC+1	AC+1		AC=Date request fulfilled.		
1.1.021	170	Public Information Requests - Exempted	AC+2	AC+2		AC=Date of denial of request.		
1.1.023	171	Organization Chart	US	US	I	I=In-school archives		
1.1.024	184	Plans and Planning Records	AC+3	AC+3	O	O – Review by School Archivist  AC = Decision made to implement or not to implement result of planning process.  ARCHIVES NOTE: Data processing planning records are not archival.		
1.1.027	195	Proposed Legislation	AV	AV				

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1.1.038	66	Customer Surveys	AC	AC	AC	AC = Final disposition of summary report. SEE item number 1.1.067 for summary reports compiled from customer surveys.		
1.1.038	205	Customer Surveys	AC	AC	AC	AC = Final disposition of summary report. SEE item number 1.1.067 for summary reports compiled from customer surveys.		
1.1.038	218	Reports, Studies, and Surveys – Final	AC+3		AC+3	AC=Final disposition of summary reports  SEE item number 1.1.067 for summary reports compiled from customer surveys		
1.1.040	238	Speeches, Papers and Presentations	AC		AC	O AC=End of term in office or termination of service in a state position. O – Review by School Archivist		
1.1.041	289	Suggestion System Records	1		1			
1.1.043	301	Training Materials	US+1		US+1			

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1.1.048	157	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>ARCHIVES NOTE: Cases that set legal precedent or exhibit historical value will be evaluated by the Archives and Information Services Division of the Texas State Library and Archives Commission for archival preservation.</p> <p>O – Review by School Archivist</p>	
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1.1.055	243	Strategic Plans	AC+6	AC+6	O	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.; O – Review by School Archivist		
1.1.056	11	ADA (Americans With Disabilities) Documentation	3	3		28 CFR 35.150(c)		

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2. Agency Code 787		3. Agency Name Lamar State College-Orange (2014)						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival 9. Remarks (2014 recertification)	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total			

1.1.057	304	Transitory Information	AC	AC	<p>AC=Purpose of record has been fulfilled. Telephone message notifications  <b>CAUTION:</b> 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.            The disposal of transitory information need not be documented through destruction signoffs (1.2.001) or in records disposition logs (1.2.010), but agencies should establish procedures governing disposal of these records as part of its records management plan (1.2.014).</p>		
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**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

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			Agency	Storage	Total				

1.1.063	166	Staff Meeting Minutes and Notes	1		1			
1.1.064	14	Agency Performance Measures Documentation	FE+3		FE+3			
1.1.065	219	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 item number 1.1.064.	
1.1.066	217	Reports - Biennial or Annual Agency (Narrative)	AC+6		AC+6	I	AC=1 Sept +6 ; I=In-school archives  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.	
1.1.067	220	Reports and Studies (Non-Fiscal)	3		3	I	Review for archival retention using TSL guidelines. ; I=In-school archives	
1.1.068	216	Reports on Performance Measures	AC+6		AC+6		AC=September 1 of odd-numbered calendar years.	

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			Agency	Storage	Total				

1.1.070	185	Agency Rules, Policies, and Procedures - Final	AC+3		AC+3	I	I=In-school archives  AC = Completion or termination of program, rules, policies, or procedures.  SEE ALSO Agency Rules, Policies and Procedures - Working Files, 1.1.071.		
1.1.071	186	Agency Rules, Policies, and Procedures - Working Files	AC+3		AC+3	I	I=In-school archives  AC = Completion or termination of program, rules, policies, or procedures.  SEE ALSO Records Series Item Number 1.1.070.		
1.1.072	197	Public Information Reports	2		2				
1.2.001	73	Destructive Authorizations	FE+3		FE+3				
1.2.003	121	Forms History File	AC+1		AC+1		AC=Discontinuance of use of form.		
1.2.004	120	Forms Inventory	US		US				

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1.2.005	212	Records Retention Schedule (SLR 105)	US		US	Original is maintained by the State and Local Records Management Division, Texas State Library and Archives Commission.		
1.2.006	213	Records Transmittal Forms	AC+2		AC+2	AC = Date of authorization for destruction, permanent transfer from storage, or transfer to the Archives and Information Services Division, Texas State Library and Archives Commission, by the agency records management officer.		
1.2.008	222	Requests for Authority to Dispose of State Records (RMD 102)	FE+3		FE+3	Original is retained by the State and Local Records Management Division, Texas State Library and Archives Commission.		
1.2.010	209	Records Disposition Logs	10		10			
1.2.012	210	Records Inventory Worksheets	US		US			

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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 (2014 recertification)	10. 106 No.	11. TSLAC ONLY Amend. No.
1.2.013	208	Records Control Locator Aids	AC		AC		AC=When aid is updated, revised or no longer needed.  CAUTION: These records must carry the same retention period and archival code of the records they support.		
1.2.014	211	Records Management Plans	US+1		US+1				
1.2.015	77	Disaster Recovery Service Transmittals (RMD 109)	FE+1		FE+1				
1.2.016	78	Disaster Recovery Service Approval form (RMD 113)	AC		AC		AC=Until superseded or termination of service		
1.3.001	16	State Publications	AC+2		AC+2	I	See 13 TAC 3.1-3.16 and Texas State Publications Programs guidelines; I=In-school archives		

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			Agency	Storage	Total				

1.3.001	191	State Publications	AC+2	AC+2		<p>AC = Until superseded or obsolete.</p> <p>CAUTION: Many state publications must be submitted to the Texas State Publications Depository Program, Texas State Library and Archives Commission, by law (Government Code 441.101-441.106). The Texas State Library and Archives Commission will retain a copy of all state publications submitted to it on a continuing basis, subject to periodic evaluation to determine if the publication merits further retention.</p> <p>For additional information and requirements concerning state publications made available to the public through the Internet, consult the administrative rules of the Texas State Publications Depository Program of the Texas State Library and Archives Commission (13 TAC</p>	
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			Agency	Storage	Total			

1.3.001	240	State Publications	AC+2	AC+2		<p>AC = Until superseded or obsolete.</p> <p>CAUTION: Many state publications must be submitted to the Texas State Publications Depository Program, Texas State Library and Archives Commission, by law (Government Code 441.101-441.106). The Texas State Library and Archives Commission will retain a copy of all state publications submitted to it on a continuing basis, subject to periodic evaluation to determine if the publication merits further retention.</p> <p>For additional information and requirements concerning state publications made available to the public through the Internet, consult the administrative rules of the Texas State Publications Depository Program of the Texas State Library and Archives Commission (13 TAC</p>	
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1.3.002	201	Publication Development Files	AV		AV	I	I=In-school archives		
2.1.001	30	Processing Files	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.		
2.1.001	192	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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			Agency	Storage	Total			

2.1.002	29	Master Files	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.	
2.1.002	163	Master Files (Computer Center)	AC		AC	<p>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.</p> <p>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.</p>	

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			Agency	Storage	Total			

2.1.007	235	Software Programs and Job Control Language	AC	AC	<p>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.</p> <p>CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.</p>		
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			Agency	Storage	Total				

2.1.008	127	Hardware Documentation	AC		AC	<p>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.</p> <p>CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.</p>		
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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 (2014 recertification)	10. 106 No.	11. TSLAC ONLY Amend. No.
2.1.009	294	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.		
2.1.010	28	Audit Trail Record	AC		AC		AC=All audit requirements have been met.		
2.1.011	115	Finding Aids, indices and Tracking systems (Automated)	AC		AC		AC=The related records been destroyed  CAUTION: These records must carry the same retention period and archival code of the records they support.		

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2.2.001	10	Systems Monitoring Records (Automated)	AV		AV			
2.2.001	293	System Monitoring Records	AV		AV			
2.2.002	49	Chargeback Records to Data Processing Services Users	FE+3		FE+3			
2.2.004	57	Computer Job Schedules and Reports	3 Mo.		3 Mo.			
2.2.011	33	Batch/Data Entry Control Forms/Logs	AC		AC	AC=When reconciliation confirmed		
2.2.012	172	Output Records for Computer Production	AV		AV			
2.2.013	204	Quality Assurance Records	AC		AC	AC=No longer needed as audit trail for any records modified.		
2.2.014	139	Internet Cookies	AV		AV	The disposal of Internet cookies need not be documented through destruction authorizations (1.2.001) or in records disposition logs (1.2.010), but agencies should establish procedures governing disposal of these records as part of its records management plan (1.2.014).		
2.2.015	131	History Files – Web Sites	AV		AV			
2.2.016	236	Software Registrations, Warranties and License Agreements	LA+3		LA+3			
3.1.001	21	Applications for Employment - Not Hired	2		2	29 CFR 1602.49(a)		

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3.1.002	20	Applications for Employment - Hired	AC+5		AC+5	AC=Termination of Employment		
3.1.006	84	Employee Counseling Records	AC+3		AC+3	AC=Termination of counseling		
3.1.011	92	Employee Insurance File	AC		AC	AC=Until superseded or termination of employment  CAUTION: Documents that serve as payroll deduction authorizations must be maintained for the retention period prescribed for item number 3.2.001.		
3.1.012	93	Employment Opportunity Advertisements	2		2	29 CFR 1602.31 [State Agencies]. 29 CFR 1602.49(a) [State Universities].		
3.1.013	94	Employment Contracts	AC+4		AC+4	AC=Expiration or termination of the contract according to its terms		
3.1.014	96	Employment Selection Records	2		2	29 CFR 1602.31 [State Agencies]. 29 CFR 1602.49(a) [State Universities].  CAUTION: Does not include criminal history checks. SEE item number 3.1.026.		

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3.1.018	129	Grievance Records	AC+2		AC+2	AC = Final decision on the grievance.  CAUTION: Does not include formal complaints filed by an agency employee with the Equal Employment Office (EEO) of the U. S. Department of Labor. SEE item number 1.1.048.		
3.1.019	176	Performance Appraisals	2		2	29 CFR 1602.32 (c)		
3.1.020	178	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 item number 3.1.021, all documentation from this series used to support disciplinary action must be retained for the the minimum retention period described by item number 3.1.021.		

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3.1.021	179	Personnel Disciplinary Action Documentation	AC+5		AC+5		AC=Termination of Employment		
3.1.022	180	Personnel Information or Action Forms	2		2		29 CFR 1602.31 [State Agencies]. 29 CFR 1602.49(a) [State Universities].		
3.1.022	187	Personnel Action Forms	US+2		US+2		29 CFR 1602.31 [State Agencies]. 29 CFR 1602.49(a) [State Universities].		
3.1.023	15	Positions/Job Descriptions	AC+4		AC+4		40 TAC 8.15.106(i)		
3.1.023	188	Position/Job Descriptions	AC+4		AC+4		AC = Until superseded or job eliminated. 40 TAC 815.106(i).		
3.1.024	183	Physical Examinations/Medical Reports	AC+2		AC+2		AC=Until superseded or termination of employment.  CAUTION: Does not include pre-employment physical examinations. SEE item number 3.1.014.		

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3.1.029	95	Employment Eligibility, Documentation or Verification of Federal reporting form (INS I-9).	AC+1	AC+1	AC=Termination of employment.  CAUTION: Federal regulation requires that INS 1-9 forms be retained for 3 years from date of hire or 1 year after separation of the employee, whichever later. Agencies should make certain that the INS I-9 forms for employees who terminate from an agency less than 3 years from date of hire are kept for the 3 year retention period.  8 CFR 274a.2(b)(2)(i)(A) and (c)(2).		
3.1.031	83	Employee Benefits-Other than Insurance	AC+2	AC+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 item number 3.2.001.		
3.1.034	227	Resumes – Unsolicited	AV	AV			

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3.1.035	177	Performance Bonds	AC+4		AC+4	AC=Expiration or termination of the bond according to its terms. CAUTION: Does not include construction or architectural surety bonds. SEE item number 5.2.028.		
3.1.036	23	Apprenticeship Records	5		5	29 CFR 30.8 (e)		
3.1.037	90	Employee Recognition Records	AC+5		AC+5	AC=Termination of Employment		
3.1.038	196	Public Access Option Form	US		US	SEE item number 3.3.011.		
3.2.001	86	Employee Deduction authorization	AC+4		AC+4	AC=After termination of employee or after amendment, expiration, termination or authorization, whichever is sooner.		
3.2.002	87	Employee Earning Records	4		4	40TAC 815.106(i)		
3.2.003	114	Federal Tax Records	AC+4		AC+4	AC = After termination of employee or after amendment, expiration, or termination of authorization, whichever sooner.		
3.2.004	133	Income Adjustment Authorizations	2		2	20 CFR 516.6. (c)		
3.2.005	315	W-4 Forms (Employer's Copy)	AC+4		AC+4	26 CFR 31.6001-1 (e) (2) AC=Until superseded, obsolete, or upon separation of employee.		

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3.2.006	316	Wage Rate Tables	2		2		29 CFR 516.6 (a) (2)		
3.2.007	307	Unemployment Compensation Records	AC+5		AC+5				
3.2.008	75	Direct Deposit Application/Authorizations	US		US				
3.2.009	239	State Deferred Compensation Records	AC+5		AC+5		AC = All accounts with a vendor or vendors for the individual participant have been closed. For instructions regarding the determination of the closure of accounts and for additional information regarding the retention period see the most current edition of the Benefits Coordinator Reference Manual issued by the Employees Retirement System of Texas.		
3.2.010	132	Human Resources Info System (HRIS) Repts	AC+4		AC+4				
3.3.001	13	Affirmative Action Plans	5		5		29 CFR 30.8 (e) for apprenticeship plans		
3.3.004	34	Benefits Plans	US+1		US+1		29 CFR 1627.3 (b) (2)		
3.3.004	137	Benefit Plans	US+4		US+4		29 CFR 1627.3(b)(2).		
3.3.011	119	Former Employee Verification Record	AC+75		AC+75		AC = Termination of employment. See item number 3.1.038.		

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3.3.015	189	Position/Job Classification Review File	US+3		US+3			
3.3.020	318	Work Schedules/Assignments	1		1			
3.3.022	297	Texas Workforce Commission (TWC) Reports	3		3			
3.3.023	215	Reimbursable Activities, Requests and Authorization to Engage In	FE+3		FE+3			
3.3.023	305	Reimbursable Activities, Requests and Authorizations to Engage in	FE+3		FE+3			
3.3.023	306	Tuition Assistance, Request for	FE+3		FE+3			
3.3.024	181	Personnel Policies and Procedures	US+3		US+3			
3.3.025	146	Job Procedure Records	US+3		US+3			
3.3.026	17	Agency Staffing Reports	US+3		US+3			
3.3.026	89	Agency Staffing Reports	US+3		US+3			
3.3.027	24	Aptitude and Skills Test	US+2		US+2		29 CFR 1602.49	
3.3.028	25	Aptitude and Skills Test (Test Papers)	2		2		29 CFR 1602.49	
3.3.029	26	Aptitude and Skills Test (Validation Records)	AC+2		AC+2		AC=As long as test is used	
3.3.030	300	Training – Administrative Records	US+2		US+2		CAUTION: Does not include hazardous material training records. SEE item number 5.4.007.	
3.3.031	81	EEO Reports`	3		3		29 CFR 1602.32, 1602.39, 1602.39, 1602.411602.48 and 1602.50	

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3.3.032	99	Equal Pay Records	3		3	29CFR 1620.32		
3.4.001	9	Accumulated Leave Adjustments Requests	FE+3		FE+3			
3.4.002	149	Leave Status Reports	FE+3		FE+3			
3.4.003	151	Less Than Full Time Worked Report	4		4	40 TAC 815.106 (i)		
3.4.004	173	Overtime Authorizations	2		2			
3.4.006	298	Time Cards and Sheets	4		4	40 TAC 815.106 (i)		
3.4.007	148	Time Off and/or Sick Leave Requests	FE+3		FE+3			
3.4.008	233	Sick leave pool documentation	FE+3		FE+3			
4.1.001	5	Accounts Payable Information	FE+3		FE+3			
4.1.002	36	Billed Detail	FE+3		FE+3	CAUTION: Does not include long distance telephone billing detail. SEE item numbers 5.5.001, 5.5.006, and 5.5.007.		
4.1.003	44	Cancelled Checks/Stubs/Warrants/Drafts	FE+3		FE+3			
4.1.004	98	Encumbrance Detail	FE+3		FE+3			
4.1.005	140	Inventory and Other Cost Files	FE+3		FE+3			
4.1.006	144	Investment Transactions Files	FE+3		FE+3			
4.1.007	303	Transfers or Budget Revisions	FE+3		FE+3			
4.1.008	82	Electronic Fund Transfers	FE+3		FE+3			
4.2.002	48	Cash Receipts	FE+3		FE+3			
4.2.003	67	Daily Cash Receipt Logs	FE+3		FE+3			
4.2.004	97	Encumbrance Vouchers	FE+3		FE+3			

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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 (2014 recertification)	10. 106 No.	11. TSLAC ONLY Amend. No.
4.2.005	202	Purchase Vouchers	FE+3		FE+3				
4.2.006	123	General Journal Vouchers	FE+3		FE+3		.		
4.2.007	106	Expenditure Vouchers	FE+3		FE+3				
4.2.001	47	Cash Deposit Vouchers-Cash Deposit Slips	FE+3		FE+3				
4.3.002	206	Receipts Journals or Registers	FE+3		FE+3				
4.3.003	107	Expenditures Journals or Registers	FE+3		FE+3		.		
4.4.001	124	General and Subsidiary Ledgers	FE + 3		FE + 3		.		
4.4.002	7	Accounts Receivable Ledgers	FE+3		FE+3				
4.4.003	6	Accounts Payable Ledgers	FE+3		FE+3				
4.4.004	91	Employee Savings Bond Ledgers	FE+3		FE+3				
4.5.001	39	Worksheets for Preparing Fiscal Reports	FE+3		FE+3				
4.5.001	320	Worksheets for Preparing Fiscal Reports	FE+3		FE+3				
4.5.002	138	Internal Fiscal Management Reports	FE+3		FE+3				
4.5.003	18	Annual Financial Report Required by the General Appropriations Act (100 Day Report).	AC+6		AC+6		AC=September 1 of odd-numbered calendar year.		
4.5.005	108	External Fiscal Reports	FE+3		FE+3				
4.5.006	19	Annual Operating Budget Required by the General Appropriations Act.	FE+3		FE+3	I	I=In-school archives		
4.5.007	308	USAS Reports – Daily	AC		AC		AC=Receipt and reconciliation of monthly report.		

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4.5.008	309	USAS Reports – Monthly	AC		AC	AC=Receipt and reconciliation of annual report.		
4.5.009	310	USAS Reports – Annual	FE+3		FE+3			
4.6.001	31	Balancing Record	FE+3		FE+3	Retention may vary. See specific funding source		
4.6.002	207	Reconciliations	FE+3		FE+3			
4.6.003	46	Cash Counts	FE+3		FE+3			
4.7	214	Refunds and Repayments	FE+5		FE+5	Pell Grant Federal Regulations and other campus based programs 34 CFR 679.19 (c)		
4.7	230	Scholarships – Awarded, Donor Files, etc.	AC+5		AC+5	AC=Graduation date or date of award Federal Register 1-19-81, part 3, DOE, Vol. 46, No.2, 672.19 P3C		
4.7.001	4	Accounting Policies and Procedures Manual	US+3		US+3			
4.7.002	32	Bank Statement	FE+3		FE+3			
4.7.003	228	Returned Checks/Warrants/Drafts (Uncollectable)	AC+3		AC+3	AC=After deemed uncollectible.		
4.7.004	45	Capital Asset Records	LA+3		LA+3			
4.7.005	51	Claim Files	AC+3		AC+3	AC=Resolution		
4.7.006	56	Comptroller Statements	FE+3		FE+3			

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4.7.007	74	Detail Chart of Accounts	FE+3		FE+3			
4.7.008	113	Federal Grant Records	AC+3		AC+3		AC = Satisfaction of all Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments (the Common Rule).  CAUTION: Retention requirements may vary depending on the specific federal funding agency. Agencies must ensure that records are retained for the appropriate retention period.	

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4.7.008	126	Grants-- Federal Information on File	AC+3		AC+3	AC = Satisfaction of all Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments (the Common Rule).  CAUTION: Retention requirements may vary depending on the specific federal funding agency. Agencies must ensure that records are retained for the appropriate retention period.		
4.7.009	118	Fixed Asset Sequential Number Logs	US+3		US+3			
4.7.010	159	Long Term Liability Records, Bonds, etc.	AC+3		AC+3	AC=Retirement of Debt		
4.7.011	296	Texas Facilities Commission (TFC) Statements	FE+3		FE+3			
4.7.012	234	Signature Authorizations	US+FE+3		JS+FE-3			

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5.1.001	60	Contracts and Leases	AC+4		AC+4	AC=Expiration or termination of the instrument according to its terms SEE item number 5.2.028 for building construction contracts and item number 5.1.017 for contract logs.		
5.1.017	59	Contract Logs	FE+3		FE+3	Includes contracts, leases, and agreements		
5.1.003	71	Delivery Reports	2		2			
5.1.004	12	Mail and Telecommunication Listings	US		US			
5.1.004	162	Mailing and Telecommunications Lists	US		US			
5.1.005	190	Postage Records	FE+3		FE+3			
5.1.007	224	Requisitions for In-Agency or Inter-Agency Copy/Printing Service	AV		AV			
5.1.010	156	License and Permits for Non-Vehicles	AC+2		AC+2	AC=Expiration date of license or permit		
5.1.011	182	Photocopier and Telefax Usage Logs & Reports	AV		AV			
5.1.012	50	Charge Schedules - Price Lists	US+3		US+3			
5.1.013	136	Insurance Policies – Vehicles, Equipment, etc.	AC+4		AC+4	AC=Expiration or termination of the policy according to its terms.		
5.1.014	168	Office Procedures	US+1		US+1			

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5.1.015	63	Correspondence Tracking Records	1		1			
5.1.015	161	Correspondence Tracking Records	1		1			
5.2.001	22	Appraisals - Building or Property	AV		AV	I	I=In-school archives	
5.2.001	104	Equipment Warranties	AC+1		AC+1		AC=Expiration of warranty	
5.2.002	41	Building Construction Projects Files	AC+10		AC+10	I	AC=Completion of project;I=In-school archives	
5.2.003	42	Building Plans and Specifications	State owned: LA Leased: AC+2		State owned: LA Leased: AC+2	I	In-school archives AC: For leased buildings, AC = Termination or cancellation of lease. SEE ALSO item numbers 5.2.002 and 5.2.028.  ARCHIVES NOTE: Archival review designation is for state-owned buildings only.	
5.2.005	43	Calibration Records (Equipment or Instrumentation)	10		10			
5.2.006	194	Property Destruction, Certificates of	FE+3		FE+3			
5.2.007	68	Damage Reports	FE+3		FE+3			
5.2.008	101	Equipment History File; Equipment Service Agreements	LA+3		LA+3			
5.2.009	102	Equipment Inventory Detail Report Forms	FE+3		FE+3			

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5.2.010	103	Equipment Manuals	LA		LA			
5.2.014	143	Inventory, Annual Physical	FE+3		FE+3			
5.2.015	142	Inventory, Notice of Equipment Removed	FE+3		FE+3			
5.2.016	141	Inventory System Update Listing	AC		AC		AC=Transfer of Information into Annual Listings	
5.2.017	160	Lost and Stolen Property Records	FE+3		FE+3			
5.2.019	232	Service Orders	1		1			
5.2.020	290	Supply Usage Reports	FE+1		FE+1			
5.2.021	291	Surplus Property Sale Reports	FE+3		FE+3			
5.2.022	311	Utility Usage Reports	AV		AV			
5.2.023	321	Year-To-Date Activity (Inventory Listing)	FE+3		FE+3			
5.2.024	165	Material Specifications	AC+2		AC+2		AC=Material no longer in the agency	
5.2.025	100	Equipment Descriptions and Specifications	AC+2		AC+2		AC= No Longer in the Agency	
5.2.026	109	Facilities Reservation Logs	2		2			
5.2.027	237	Space Utilization Reports	AV		AV			
5.2.028	40	Building Construction Contract and Inspection Records Building construction contracts, surety bonds, and inspection records.	LA+10		LA+10	I	I=In-school archives SEE ALSO item numbers 5.2.002 and 5.2.003.	
5.3.003	122	Freight Claims	AC+2		AC+2		AC=Resolution of claim	
5.3.005	174	Packing Slips	AV		AV			

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5.3.007	35	Bid Documentation	FE+3		FE+3		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 item number 5.1.001 and 5.2.028.		
5.3.008	203	Purchasing Logs	FE+3		FE+3				
5.3.009	223	Requests for Information	AC		AC		AC=Date of direct purchase, issuance of request for bids, or decision not to proceed with the procurement, as applicable.		
5.4.001	3	Accident Reports and Associated Documentation	CE+5		CE+5		29 CFR 1904.33 Texas Department of Insurance Copy is retained additional 50 years.		
5.4.001	117	Accident Reports and Associated Documentation	CE+5		CE+5		29 CFR 1904.33 The Texas Workers Compensation Commissions copy is retained in additional 50 years		
5.4.001	319	Accident Reports and Associated Documentation	CE+5		CE+5		29 CFR 1904.6 Texas Workers Compensation Commission's Copy if retained 50 years.		

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5.4.002	105	Evacuation Plans	US		US				
5.4.003	134	Inspection Records	AC+3		AC+3		AC = Inspection, or date of the correction of the deficiency if the inspection report reveals a deficiency.  CAUTION: Does not include inspection reports of building construction. SEE item number 5.2.028.		
5.4.003	229	Inspection Records	AC+3		AC+3		AC = Inspection, or date of the correction of the deficiency if the inspection report reveals a deficiency.  CAUTION: Does not include inspection reports of building construction. SEE item number 5.2.028.		
5.4.004	116	Fire Inspection Records/Orders	AC+3		AC+3		AC=Deficiency Corrected		
5.4.007	130	Hazardous Materials Training Records	5		5		Texas Health and Safety Codes 502.009 (g)		

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5.4.008	128	Hazard Communications Plans	US+5		JS+5		Texas Health and Safety Code 502.009 (g)		
5.4.009	317	Workplace Chemical List	30		30		Texas Health and Safety Code 502.005 (d)		
5.4.010	164	Material Safety Data Sheets	AC		AC		AC = After sheets are updated or hazardous chemical no longer stored by agency, as applicable.		
5.4.012	88	Security Access Records	AC+2		AC+2		AC = Until superseded, date of expiration, or date of termination, whichever sooner.		
5.4.012	231	Security Access Records	AC+2		AC+2		AC=Until superseded, date of expiration, or date of termination, whichever is sooner.		
5.4.013	79	Disaster Preparedness and Recovery Plans	US		US				
5.5.001	37	Billing Detail - Telecommunications (Other Than TEX-AN)	FE+3		FE+3		SEE item number 5.5.006 for TEX-AN billing detail.		
5.5.002	158	Long Distance Telephone Logs	AV		AV				
5.5.003	241	Station Activity Report (Telecon)	AV		AV				
5.5.004	292	System Activity Report	AV		AV				

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**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)**

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# STATE OF TEXAS

## Records Retention Schedule

**SLR 105**

*Form SLR 105C must accompany this form.*

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2. Agency Code 787		3. Agency Name Lamar State College-Orange (2014)						
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. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Agency	7. Storage	7. Total	8. Archival	9. Remarks (2014 recertification)	10. 106 No.	11. TSLAC ONLY Amend. No.
5.5.006	38	Billing Detail- Telecommunications (TEX-AN)	FE+3		FE+3		The billing agency will maintain all long distance TEX-AN records and will provide each using agency its bill summary of centralized capitol complex telephone service without call detail records. For these bill summaries, SEE item number 4.7.011. SEE item number 5.5.001 for billing detail from carriers other than TEX-AN.		
5.5.007	80	Disputed Call Documentation	FE+3		FE+3				
5.6.003	135	Inspection Repair and Maintenance Records	LA+1		LA+1				
5.6.003	312	Inspection Repair and Maintenance Records - Vehicles	LA+1		LA+1				
5.6.004	155	License and Driving Records Checks	AC		AC		AC=Until superceded or termination of employment.		
5.6.005	167	Vehicle Use Reports	FE+3		FE+3				
5.6.005	314	Vehicle Use Reports	FE+3		FE+3				
5.6.007	313	Vehicle Titles and Registration	LA		LA				
5.6.009	175	Parking Permits or Assignments	US		US				

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