



August 29, 2018

Brian McCall
Chancellor
Lamar State College – Port Arthur
Thomas J. Rusk Building
200 E. 10th Street
Austin, TX 78701

Re: Agency records retention schedule approved for use.

Lorenzo de Zavala
State Archives and
Library Building

1201 Brazos Street
Austin, Texas
78701

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

www.tsl.texas.gov

Commission Chairman
Michael C. Waters

Members

David C. Garza
F. Lynwood Givens
Larry G. Holt
Arthur T. Mann
Darryl Tocker
Martha Wong

Director and Librarian
Mark Smith

Assistant State Librarian
Gloria Meraz

Dear Mr. McCall,

Your agency's records retention schedule is approved for use as of August 24, 2018. Your currently approved records retention schedule is available on our website at <https://www.tsl.texas.gov/slrn/state/schedules.html>. Please ensure that all old copies of the schedule are superseded with this recertified copy.

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

Each agency schedule must be reviewed, updated and submitted for recertification annually for the first two years after the initial approval of the schedule and every five years thereafter. The deadline for submission of your schedule for its next recertification is the last working day of **August 2023**.

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, Andrew Glass at 512-463-2631 or aglass@tsl.texas.gov.

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

Sincerely,

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

Craig Kelso
Director and State Records Administrator

cc: Agency head

TSLAC

*Preserving yesterday
Informing today
Inspiring tomorrow*



Texas
State Library
and Archives
Commission

STATE OF TEXAS

Records Retention Schedule Certification

SLR 105C

EW

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 758 / 788

Agency Name Texas State University System /
Lamar State College - Port Arthur, Tx

(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) Chancellor Brian McCall, Ph.D.

Date 07/14/2014

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) Gloria Meraz

Date 8/24/18

Recertification 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
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2. Agency code 758 / 788		3. Agency Name: Texas State University System /Lamar State College Port Arthur							
4. Records Series Item No.	5. Agency Item No.	6. Records Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				
1.1.002	FIN-01	AUDITS - Audits and reviews performed by or on behalf of an agency, including the working papers that support the audit. Also includes audits performed on the agency.	AC+7		AC+7		AC = Publication or release of final audit findings. The State Auditor's Office retains any copies of it audits performed on Texas state agencies.		
1.1.004	FIN-02	LEGISLATIVE APPROPRIATION REQUESTS - Including any supporting documentation created and/or used to justify and support legislative appropriations requests by an agency.	AC+6		AC+6	I	I= Transfer to Univ. Archives. AC = September 1 of odd-numbered 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.		
1.1.006	LSC-01	COMPLAINT RECORDS - Complaints received by an agency from the public concerning the agency and records pertaining to the resolution of the complaint.	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 item number 1.1.048.		
1.1.007	LSC-02	CORRESPONDENCE-ADMINISTRATIVE - Incoming/outgoing and internal correspondence pertaining to the formulation, planning, implementation, interpretation, modification, or redefinition of the programs, services, or projects of an agency and the administrative regulations, policies, and procedures that govern them.	4		4	O V	O= Review by Univ. Archives. V= Vital ARCHIVES NOTE: Only the administrative correspondence of 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: This records series and item number 1.1008 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 item number 1.1.004, etc. SEE ALSO item number 1.1.011		



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2. Agency code 758 / 788		3. Agency Name: Texas State University System /Lamar State College Port Arthur								
4. Records Series Item No.	5. Agency Item No.	6. Records Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total					
1.1.008	LSC-03	CORRESPONDENCE-GENERAL - Non-administrative incoming/outgoing and internal correspondence, in any media, pertaining to or arising from the routine operations of the policies, programs, services, or projects of an agency.	2		2		SEE comment to item number 1.1.007 SEE ALSO item number 1.1.011			
1.1.010	LSC-04	DIRECTIVES - Any document that officially initiates, rescinds, or amends general office procedures.	US+1		US+1		US= Until superseded			
1.1.011	LSC-05	EXECUTIVE ORDERS - Any document that initiates, rescinds, or amends a regulation, policy, or procedure that governs the programs, services, or projects of an agency.	US+3		US+3	I V	I= Transfer to Univ. Archives. US= Until superseded V = Vital			
1.1.013	LSC-06	CALENDARS, APPOINTMENT AND ITINERARY RECORDS - Calendars, appointment books or programs and scheduling, or itinerary records, purchased with state funds or maintained by staff during business hours that document appointments, itineraries, and other activities of agency officials or employees.	CE+1		CE+1	O	O= Review by Univ. Archives. CE= Calendar year end: December 31 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.			
1.1.014	PRE-01	LEGAL OPINIONS AND ADVICE - From agency legal counsel or the Attorney General, including any requests eliciting the opinions.	AV		AV	O	O= Review by Univ. Archives. AV=As long as administratively valuable. 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.			



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2. Agency code 758 / 788		3. Agency Name: Texas State University System /Lamar State College Port Arthur							
4. Records Series Item No.	5. Agency Item No.	6. Records Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				
1.1.019	STU-01	PUBLIC RELATIONS RECORDS - New, press releases, or any public relations files maintained or issued by an agency. Includes print, electronic, audio, and audiovisual records.	2		2	O	O= Review by Univ. Archives.		
1.1.020	PRE-02	PUBLIC INFORMATION REQUESTS - NOT EXEMPTED - Includes all correspondence and documentation relating to requests for records that are furnished to the public under Public Information Act (Chapter 552, Government Code).	AC+1		AC+1		AC = Date request fulfilled.		
1.1.021	PRE-03	PUBLIC INFORMATION REQUESTS - EXEMPTED - Includes all correspondence and documentation relating to requests for records that are exempt under the Public Information Act (Chapter 552, Government Code).	AC+2		AC+2		AC = Date of notification that records are exempt.		
1.1.023	PRE-04	ORGANIZATION CHARTS	US		US	I	I= Transfer to Univ. Archives. US= Until superseded		
1.1.024	LSC-07	PLANS AND PLANNING RECORDS - Plans and records relating to the process of planning new or redefined programs, services, or projects of an agency that are not included in or directly related to other records series in this schedule.	AC+3		AC+3	O	O= Review by Univ. Archives. AC = Decision made to implement or not implement result of planning process. ARCHIVES NOTE: Data processing planning records are not		
1.1.027	PRE-05	PROPOSED LEGISLATION - Drafts of proposed legislation and related correspondence.	AV		AV		AV= As long as administratively valuable		
1.1.038	LSC-08	CUSTOMER SURVEYS - Surveys returned by the customers or clients of an agency and the statistical data maintained rating an agency's performance.	AC		AC		AC= After closed SEE item number 1.1.067 for summary reports compiled from customer surveys.		
1.1.040	LSC-09	SPEECHES, PAPERS AND PRESENTATIONS - Notes or text of speeches, papers, or reports delivered in conjunction with agency work.	AC		AC	O	O= Review by Univ. Archives. AC= End of term in office or termination of service in a state position.		



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2. Agency code 758 / 788		3. Agency Name: Texas State University System /Lamar State College Port Arthur							
4. Records Series Item No.	5. Agency Item No.	6. Records Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				
1.1.041	LSC-10	SUGGESTION SYSTEM RECORDS - Suggestions submitted by agency personnel and responses.	1		1				
1.1.048	PRE-06	LITIGATION FILES - Records created by or on behalf of an agency in anticipation of or in the adjudication of a lawsuit.	AC+1		AC+1	O	O= Review by Univ. Archives. 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. ARCHIVES NOTE: Cases that set legal precedent or exhibit historical value will be evaluated by the University Archives for archival preservation.		
1.1.055	PRE-07	STRATEGIC PLANS - Information resources and operational strategic plans prepared in accordance with Sections 2054.095 and 2056.002, Government Code.	AC+6		AC+6	I	I= Transfer to Univ. Archives. 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.		
1.1.056	PHY-01	ADA (AMERICANS WITH DISABILITIES ACT) DOCUMENTATION - Self evaluations and plans documenting compliance with the requirements of the Americans With Disabilities Act.	3		3		28 CFR 35.105 (c).		



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2. Agency code 758 / 788		3. Agency Name: Texas State University System /Lamar State College Port Arthur							
4. Records Series Item No.	5. Agency Item No.	6. Records Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				
1.1.057	LSC-11	TRANSITORY INFORMATION - Records of temporary usefulness that are not an integral part of a records series of an agency, that are not regularly filed within an agency's recordkeeping system, and that are required only for a limited period of time for the completion of an action by an official or employee of the agency or in the preparation of an on-going records series. Transitory records are not essential to the fulfillment of statutory obligations or to the documentation of agency functions. Some examples of transitory information, which can be in any medium (voice mail, fax, email, hard copy, etc.) are routine messages; internal meeting notices; routing slips; incoming letters or memoranda of transmittal that add nothing of substance to enclosures; and similar routine information used for communication, but not for the	AC		AC		AC=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. The disposal of transitory information need not be documented through destruction signoffs (1.2.001) or in records dispositions logs (1.2.010), but agencies should establish procedures governing disposal of these records as part of its records management plan (1.2.014).		
1.1.063	LSC-12	STAFF MEETING MINUTES AND NOTES - Minutes or notes, and supporting documentation, taken at internal agency staff meetings.	1		1				
1.1.064	LSC-13	AGENCY PERFORMANCE MEASURES DOCUMENTATION - Any records of an agency needed for documentation of output, outcome, efficiency, and explanatory measures in an agency's appropriations request or strategic plan, and for	FE+3		FE+3	V	FE= Fiscal year end: August 31 V= Vital 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.		



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2. Agency code 758 / 788		3. Agency Name: Texas State University System /Lamar State College Port Arthur								
4. Records Series Item No.	5. Agency Item No.	6. Records Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total					
1.1.065	LSC-14	REPORTS AND STUDIES (NON-FISCAL) - RAW DATA - Information or data collected and compiled for the purpose of producing non-fiscal reports.	AV		AV		AV= As long as administratively valuable 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	PRE-08	REPORTS - BIENNIAL OR ANNUAL AGENCY (NARRATIVE) - Biennial narrative reports to the governor and legislature as required by an agency's enabling statutes, including annual narrative reports if they are required by statute.	AC+6		AC+6	I	I= Transfer to Univ. Archives. 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.			
1.1.067	PRE-09	REPORTS AND STUDIES (NON-FISCAL) - Annual, sub-annual, or special reports or studies on non-fiscal aspects of an agency's programs, services, or projects compiled by agency personnel, advisory committees, or by consultants under contract with an agency that are not noted elsewhere in this schedule. Includes reports distributed either internally or to other entities	3		3	O	O= Review by Univ. Archives. ARCHIVES NOTE: For agencies that have had an archival appraisal, separate this records series by each type of archival coding, I and O, or E. SEE page viii for more information.			
1.1.068	FIN-03	REPORTS OF PERFORMANCE MEASURES - Quarterly and annual reports on agency performance measures submitted to the executive and legislative budget offices.	AC+6		AC+6		AC = September 1 of odd -numbered calendar years.			
1.1.069	LSC-15	REPORTS - ACTIVITY - Reports compiled by agency personnel on a daily or other periodic basis pertaining to workload monitoring, task completion times, number of public contacts, and similar activities	1		1		CAUTION: See item number 1.1.064.			



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2. Agency code 758 / 788		3. Agency Name: Texas State University System /Lamar State College Port Arthur							
4. Records Series Item No.	5. Agency Item No.	6. Records Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				
1.1.070	LSC-16	AGENCY RULES, POLICIES, AND PROCEDURES - FINAL - Manuals, guidelines, administrative rules, or similar records distributed internally for the use of employees or externally to the public or those individuals or entities regulated by an agency that sets out the rules, policies, and precedures that govern an agency's programs, services, or projects.	AC+3		AC+3	O V	O= Review by Univ. Archives. AC= Completion or termination of program, rules, policies, or procedures. V= Vital SEE ALSO Agency Rules, Policies and Procedures - Working Files, 1.1.071.		
1.1.071	LSC-17	AGENCY RULES, POLICIES, AND PROCEDURES - WORKING FILES - Working files used in the development of manuals, guidelines, administrative rules, or similar records distributed internally for the use of employees or externally to the public or those individuals or entities regulated by an agency that sets out the rules, policies, and procedures that govern an agency's programs, services, or projects.	AC+3		AC+3	O V	O= Review by Univ. Archives. AC= Completion or termination of program, rules, policies, or procedures. V= Vital SEE ALSO Records Series Item Number 1.1.070		
1.2.001	LIB-01	DESTRUCTION AUTHORIZATIONS - Agency level documents authorizing final disposition of records under a certified records retention schedule.	FE+3		FE+3		FE= Fiscal year end: August 31.		
1.2.003	LSC-18	FORMS HISTORY FILE -Print masters of original version and all subsequent revisions to an agency form, including any associated design or design modifaicon requests.	AC+1		AC+1		AC=Discontinuance of use of form.		
1.2.005	LIB-02	RECORDS RETENTION SCHEDULE (SLR 105) - Agency copy. Formerly RMD 105. Includes documentation of certification and approval-forms SLR 105C (formerly RMD 105C), and/or other forms designated by the State Records Administrator.	US		US		US= Until superseded Original is retained permanently by the State and Local RecordsManagement Division, Texas State Library and Archives Commission.		



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2. Agency code 758 / 788		3. Agency Name: Texas State University System /Lamar State College Port Arthur							
4. Records Series Item No.	5. Agency Item No.	6. Records Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				
1.2.008	LIB-03	REQUEST FOR AUTHORITY TO DISPOSE OF STATE RECORDS (RMD 102) - Agency copy	FE+3		FE+3		FE= Fiscal year end: August 31 Original is retained permanently by the State and Local RecordsManagement Division, Texas State Library and Archives Commission.		
1.2.010	LIB-04	RECORDS DISPOSITION LOG - Logs or similar records listing records destroyed or transferred to the Archives and Information Services Division, Texas State Library, showing records series title, dates of records, and date destroyed or transferred.	10		10				
1.2.012	LSC-19	RECORDS INVENTORY WORKSHEETS	US		US		US= Until superseded		
1.2.013	LIB-05	RECORDS CONTROL LOCATOR AIDS - Includes indexes, card files, shelf lists, registers, guides, etc.	US		US		US= Until superseded CAUTION: These records must carry the same retention period and archival code of the records they support.		
1.2.014	LIB-06	RECORDS MANAGEMENT PLANS - Records management plans and similar records that establish the policies and precedures under which records and information are managed in an agency.	US +1		US +1		US= Until superseded		
1.2.015	PHY-02	DISASTER RECOVERY SERVICE TRANSMITTALS (RMD 109) - Also includes documentation for disaster recovery services provided by other entities.	FE+1		FE+1		FE= Fiscal year end: August 31		
1.2.016	PHY-03	DISASTER RECOVERY SERVICE APPROVAL FORM (RMD113) - Agency copy of form.	AC		AC		AC= Until superseded or termination of service.		



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4. Records Series Item No.	5. Agency Item No.	6. Records Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				
1.3.001	STU-02	STATE PUBLICATIONS - One copy of each state publication as defined on page x of the introduction of this schedule, except a publication that is subject to a different retention period in this schedule. For example, a meeting agenda (see item number 1.1.058) also meets the definition, but it must be retained permanently; item number 1.1.004, 1.1.055, 1.1.066, 1.1.068, and 4.5.003, which also meet the definition, are closely associated with the appropriations process and must be retained AC+6.	AC+2		AC+2		AC= Until superseded or obsolete. CAUTION: Many state publications must be submitted to the Texas State Publications Depository Program, Texas State Library and Archives Commission, by law (Government Code §441.101-441.106). The Texas Archives Commission will retain a copy of all state publications submitted to it on a continuing bases, subject to periodic evaluation to determine if the publication merits further retention. For additional information and requirements concerning state publications made available to the public through the Internet, consult the administrative rules of the Texas State Publications Depository Program (13 TAC §§ 3.1-3.16)		
1.3.002	STU-03	PUBLICATION DEVELOPMENT FILES - Background material, copy (drafts), original artwork, photo negatives, prints, flats, etc. This includes all work performed both inside and outside the agency.	AV		AV	O	AV= As long as administratively valuable O= Review by Univ. Archives.		
2.1.001	IT-01	PROCESSING FILES - Machine-readable files used in the creation, utilization, and updating of master files.	AC		AC	V	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. V=Vital		



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2. Agency code 758 / 788		3. Agency Name: Texas State University System /Lamar State College Port Arthur							
4. Records Series Item No.	5. Agency Item No.	6. Records Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				
2.1.002	IT-02	MASTER FILES - Relatively long-lived computer files containing organized and consistent sets of complete and accurate electronic records. Examples include, but are not limited to, data tables of relational databases used by applications or computer programs.	AC		AC	V	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. V= Vital		
2.1.007	IT-03	SOFTWARE PROGRAMS - Automated software applications and operating systems files including job control language, program listing/source code, etc.	AC		AC	V	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.		
2.1.008	IT-04	HARDWARE DOCUMENTATION - Records documenting operational and maintenance requirements of computer hardware such as operating manuals, hardware/operating system requirements, hardware configurations, and equipment control systems.	AC		AC	V	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. V-Vital		

2.1.009	IT-05	TECHNICAL DOCUMENTATION - Records adequate to specify all technical characteristics necessary for reading or processing of electronic records and their timely, authorized disposition including documentation describing how a system operates and necessary for using the system such as user guides, system or sub-system definitions, systems specifications, input and output specifications, and system flow charts; program descriptions and documentation such as program flowcharts, program maintenance logs, change notices, and other records that document modifications to computer programs; and data documentation necessary to access, retrieve, manipulate and interpret data in an automated system such as a data element dictionary, file layout, code book or table, and other records that explain the meaning,	AC		AC	V	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. V= Vital CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.		
2.2.004	IT-06	COMPUTER JOB SCHEDULES AND REPORTS - Schedules or similar records showing computer jobs to be run and other reports by computer operators or programmers of work performed.	3MO		3MO				



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2. Agency code 758 / 788		3. Agency Name: Texas State University System /Lamar State College Port Arthur								
4. Records Series Item No.	5. Agency Item No.	6. Records Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.	
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2.2.010	IT-07	DATA PROCESSING POLICIES AND PROCEDURES - Manuals, guidelines, or similar documents establishing data processing policies and procedures in an agency in such areas as access and security, systems development, data retention and disposition, data ownership, production control, system back-up, etc.	US+3		US+3	V	US= Until superseded V= Vital CAUTION: Does not include technical documentation of procedures necessary for reading or processing of electronic records. SEE item number 2.1.009			
2.2.011	IT-08	BATCH DATA ENTRY CONTROL RECORDS - Forms and logs used to reconcile batches submitted for processing against batches received and processed.	AC		AC		AC= When reconciliation confirmed.			
2.2.012	IT-09	OUTPUT RECORDS FOR COMPUTER PRODUCTION - Reports showing transactions that were accepted, rejected, suspended, and/or processed.	AV		AV	V	AV= As long as administratively valuable. V=Vital			
2.2.013	IT-10	QUALITY ASSURANCE RECORDS - Information verifying the quality of system, hardware, or software operations including records of errors or failures and the loss of data resulting from such failures, documentation of abnormal termination and of error free processing, checks of changes put into production, transaction histories, and other records needed as an audit trail to evaluate data accuracy.	AC		AC		AC= No longer needed as an audit trail for any records modified.			
2.2.014	IT-11	INTERNET COOKIES - Data resident on hard drives that make use of user-specific information transmitted by the Web server onto the user's computer so that the information might be available for later access by itself or other servers.	AV		AV		AV= As long as administratively valuable. 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	IT-12	HISTORY FILES-WEB SITES - A record of the documents visited during an Internet session that allows users to access previously visited pages more quickly or to generate a record of a user's progress.	AV		AV	AV= As long as administratively valuable. The disposal of history files 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)		
2.2.016	IT-13	SOFTWARE REGISTRATIONS, WARRANTIES AND LICENSE AGREEMENT	LA+3		LA+3 V	LA= The record is retained until disposal of the asset. V= Vital		
3.1.001	HR-01	APPLICATIONS FOR EMPLOYMENT - NOT HIRED - Applications, resumes, transcripts, letters of reference, and similar documents whose submission by candidates for vacant positions is required on the application form, by application procedures, or in the employment advertisement.	2		2	29 CFR 1602.31 [State Agencies] 29 CFR 1602.49 (a) [State Universities]		
3.1.002	HR-02	APPLICATIONS FOR EMPLOYMENT - HIRED - Applications, resumes, transcripts, letters of reference, and similar documents whose submission by candidates for vacant positions is required on the application form, by application procedures, or in the employment advertisement.	AC+5		AC+5	AC = Termination of employment		



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2. Agency code **758 / 788** 3. Agency Name: **Texas State University System /Lamar State College Port Arthur**

4. Records Series Item No.	5. Agency Item No.	6. Records Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				
3.1.006	HR-03	EMPLOYEE COUNSELING RECORDS - Notes, memoranda, or reports relating to the counseling of an employee for work-related, personal, or substance abuse problems. Usually maintained at the supervisory level except in those agencies with counseling staff.	AC+3		AC+3		AC = Termination of counseling		
3.1.011	HR-04	EMPLOYEE INSURANCE RECORDS - Agency copies of information relating to the selection by employees of life, disability, health, and other types of insurance offered by the State of Texas to its employees.	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	HR-05	EMPLOYMENT OPPORTUNITY ANNOUNCEMENTS - Internal or external announcements or advertisements of job openings, promotions, training programs, or opportunities for overtime.	2		2		29 CFR 1602.31 (a) [State Agencies] 29 CFR 1602.49 (a) [State Universities]		
3.1.013	HR-06	EMPLOYMENT CONTRACTS	AC+4		AC+4	V	AC= Expiration or termination of the contract according to its terms. V= Vital		
3.1.014	HR-07	EMPLOYMENT SELECTION RECORDS - Includes notes of interviews with candidates, questions asked of applicants, audio and videotapes of job interviews, driving record and previous injury checks, pre-employment physical examinations, pre-employment drug screening test results, polygraph examination results; and all other records that document the selection process.	2		2	V	V= Vital 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.		
3.1.018	HR-08	GRIEVANCE RECORDS - Records relating to the review of employee grievances against personnel policies, working conditions, etc.	AC+2		AC+2	V	AC = Final decision on the grievance V= Vital 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	HR-09	PERFORMANCE APPRAISALS	2		2		29 CFR 1620.32 (c)		

3.1.020	HR-10	<p>PERSONNEL CORRECTIVE ACTION DOCUMENTATION - Corrective actions are those actions which do not affect pay, status, or tenure and are imposed to correct or improve an employee's job performance.</p>	AC+5		AC+5	<p>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 minimum retention period described by item number 3.1.021.</p>		
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2. Agency code 758 / 788		3. Agency Name: Texas State University System /Lamar State College Port Arthur							
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			Agency	Storage	Total				
3.1.021	HR-11	PERSONNEL DISCIPLINARY ACTION DOCUMENTATION - Disciplinary actions are those actions which may affect pay, status, or tenure. They are imposed to discipline an employee whose conduct is harmful to the best interests of the state, the agency, or the employee work force, and for failure to improve performance or conduct following imposition of corrective action. May include cause for demotion, suspension, or dismissal, and the reasons for failure to give written notice of resignation. May also be used to document evidence of employee self-improvement efforts, as well as favorable and unfavorable communication.	AC+5		AC+5	V	AC = Termination of employment V= Vital		
3.1.022	HR-12	PERSONNEL INFORMATION OR ACTION FORMS - Forms or similar records used to create or change information concerning the records of an employee including pay grade, position classification, employee number, evaluation date, and termination of employment.	2		2		29 CFR 1602.31 [State Agencies] 29 CFR 1602.49 (a) [State Universities]		
3.1.023	HR-13	POSITION/JOB DESCRIPTIONS - Job descriptions, including all associated task or skill statements, for positions in an agency.	AC+4		AC+4	V	AC= Until superseded or job eliminated. 40 TAC 815.106 (i) V= Vital		
3.1.026	HR-14	CRIMINAL HISTORY CHECKS - Criminal history record information on job applicants or agency employee obtained from the Department of Public Safety (DPS).	AC		AC		AC= The criminal history record has served the immediate purpose for which it was obtained. CAUTION: An agency that is authorized to obtain a criminal history record information from DPS must refer to its agency's legislation or see Subchapter F, Chapter 411, Government Code for appropriate retention and use of this information.		

3.1.027	LSC-20	TRAINING AND EDUCATIONAL ACHIEVEMENT RECORDS (INDIVIDUAL) - Certificates of completion, transcripts, test scores, or similar records documenting the training, testing, or continuing education achievements of an employee.	AC+5		AC+5		AC = Termination of employment		
3.1.029	HR-15	EMPLOYMENT ELIGIBILITY, DOCUMENTATION OR VERIFICATION OF - Federal reporting form (INS I-9).	AC+1		AC+1	V	AC = Termination of employment V= Vital 8 CFR 274a.2(b)(2)(i)(A) and (c)(2) CAUTION: Federal regulation requires that INS I-9 forms be retained for 3 years from date of hire or 1 year after separation of the employee, whichever later. Agencies should make certain that the INS I-9 forms for employees who terminate from an agency less than 3 years from date of hire are kept for the 3 year retention period.		
3.1.031	HR-16	EMPLOYEE BENEFITS-OTHER THAN INSURANCE - Agency copies of information relating to the selection of available benefit options 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 itme number 3.2.001.		



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			Agency	Storage	Total				
3.1.037	HR-17	EMPLOYEE RECOGNITION RECORDS - Awards, incentives, tenure, etc.	AC+5		AC+5		AC = Termination of Employment		
3.1.038	HR-18	PUBLIC ACCESS OPTION FORM - Form completed and signed by employee or official, or former employee or official, electing to keep home address, home telephone number, social security number, and family information open or confidential under the Public Information Act, Government Code §552.024.	US		US	V	US= Until superseded. V= Vital See item number 3.3.011		
3.2.001	HR-19	EMPLOYEE DEDUCTION AUTHORIZATIONS - Documentation used to start, modify, or stop all voluntary or required deductions from payroll, including garnishment or other court-ordered attachments.	AC+4		AC+4	V	AC = After termination of employee or after admendment, expiration or termination of authorization, whichever sooner. V= Vital		
3.2.002	HR-20	EMPLOYEE EARNINGS RECORDS	4		4	V	40 TAC 815.106 (i) V= Vital		
3.2.003	HR-21	FEDERAL TAX RECORDS - Includes 1099.W2.FICA and other tax records.	AC+4		AC+4	V	AC= Tax due date, date the claim is filed, or date tax is paid, whichever is later V= Vital 26 CFR 31.6001-1(e)(2)		
3.2.004	HR-22	INCOME ADJUSTMENT AUTHORIZATIONS - Used to make increases or decreases to employees' gross pay, FICA, retirement, or in the computation of taxes.	2		2	V	29 CFR 516.6 (c) V= Vital		
3.2.005	HR-23	W-4 FORMS - Employer's copy of "Employee's Withholding Exemption Certificate."	AC+4		AC+4	V	AC= Until superseded, obsolete, or upon separation of employee. V= Vital 26 CFR 31.6001-1 (e)(2)		
3.2.006	HR-24	WAGE RATE TABLES	2		2		29 CFR 516.6(a) (2)		
3.2.007	FIN-04	UNEMPLOYMENT COMPENSATION RECORDS	AC+5		AC+5		AC = Termination of Employment		
3.2.008	HR-25	DIRECT DEPOSIT APPLICATION/AUTHORIZATIONS	US		US	V	US= Until superseded V= Vital		

3.2.009	HR-26	STATE DEFERRED COMPENSATION RECORDS	AC+5		AC+5	V	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. V= Vital		
3.2.010	HR-27	HUMAN RESOURCES INFORMATION SYSTEM (HRIS) REPORTS - Includes supporting documentation.	AC+4		AC+4		AC = Fiscal Year End		
3.3.001	HR-28	AFFIRMATIVE ACTION PLANS - Affirmative action plans for both regular employees and apprenticeship programs.	5		5		29 CFR 30.8(e) for apprenticeship plans.		
3.3.004	HR-29	BENEFIT PLANS - Employee benefit plans such as pension; life, health, and disability insurance; deferred compensation; etc., including amendments.	US+1		US+1		US= Until superseded 29 CFR 1627.3(b)(2)		
3.3.010	HR-30	LABOR STATISTICS REPORTS - Reports providing statistical information on labor force.	3		3				



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3.3.011	HR-31	FORMER EMPLOYEE VERIFICATION RECORDS - Minimum information needed to verify employment, includes name, social security number, exact dates of employment, last known address and most recent public access option form.	AC+75		AC+75	V	AC = Termination of employment V= Vital See item number 3.1.038.		
3.3.015	HR-32	POSITIONS/JOB CLASSIFICATION REVIEW FILE - Records relating to review and monitoring of job classifications within an agency.	US+3		US+3		US= Until superseded		
3.3.020	LSC-21	WORK SCHEDULES/ASSIGNMENTS - Work, duty, shift, crew, or case schedules, rosters, or assignments.	1		1				
3.3.022	HR-33	TEXAS WORKFORCE COMMISSION (TWC) REPORTS - Reports to the agency from TWC or its predecessor pertaining to employees.	3		3				
3.3.023	FIN-05	REIMBURSABLE ACTIVITIES, REQUESTS AND AUTHORIZATIONS TO ENGAGE IN - Requests and authorizations for travel; participation in educational programs, workshops, or college classes; or for other work-related activities for which the expenses of the employee are defrayed or reimbursed.	FE+3		FE+3		FE= Fiscal year end: August 31.		
3.3.024	HR-34	PERSONNEL POLICIES AND PROCEDURES - Any internally distributed manuals, guidelines, or similar records that define agency wide policies and procedures concerning the personnel of an agency.	US+3		US+3		US= Until superseded		
3.3.025	HR-35	JOB PROCEDURE RECORDS - Any documents detailing the procedural duties and responsibilities of agency positions on a position-by-position basis.	US+3		US+3		US= Until superseded		

3.3.026	HR-36	AGENCY STAFFING REPORTS - Any reports compiled by an agency on aspects of personnel staffing, including listings of all staff by program or name; staff hired during a month; detailed listings of employees within its organizational structure, position vacancies, analyses of turnover rates and seasonality of employment, etc.	US+3		US+3	US= Until superseded		
3.3.027	HR-37	APTITUDE AND SKILLS TESTS - Aptitude or skills tests required of job applicants or of current personnel to qualify for promotion or transfer.	US +2 years		US +2 years	US= Until superseded 29 CFR 1602.31 [State Agencies] 29 CFR 1602.49 [State Universities] CAUTION: One copy of each different test (different in terms of either questions or administration procedures) should be retained for the period indicated.		
3.3.028	HR-38	APTITUDE AND SKILLS TEST (TEST PAPER) - Aptitude and skills test papers of job applicants or of current personnel taking a test to qualify for promotion or transfer.	2		2	29 CFR 1602.31 [State Agencies] 29 CFR 1602.49 [State Universities]		
3.3.029	HR-39	APTITUDE AND SKILLS TESTS (VALIDATION RECORDS) - Records of the validation of aptitude and skills tests.	AC+2 years		AC+2 years	AC= As long as the test is used by an agency 29 CFR 1602.31 [State Agencies] 29 CFR 1602.49 [State Universities]		



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3.3.030	HR-40	TRAINING ADMINISTRATION RECORDS - Instructional materials and other records associated with in-house training of agency personnel on personnel policies and procedures and other policies and procedures that govern an agency's programs, services, or projects.	US+2		US+2		US= Until superseded CAUTION: Does not include hazardous material training records. SEE item number 5.4.007.		
3.3.031	HR-41	EEO REPORTS AND SUPPORTING DOCUMENTATION - Includes documentation used to complete EEO reports.	3		3		29 CFR 1602.32, 1602.39, 1602.41, 1602.48, and 1602.50.		
3.3.032	HR-42	EQUAL PAY RECORDS - Reports, studies, aggregated or summary data, and similar documentation compiled to monitor and demonstrate compliance with the federal Equal Pay Act.	3		3	V	29 CFR 1620.32© V= Vital		
3.4.001	HR-43	ACCUMULATED LEAVE ADJUSTMENT REQUESTS - Used to create employee leave balances, to transfer leave balances when an employee transfers positions, to adjust carry-over balances on August 31, to correct errors on leave accumulation, and to close out leave accounts on separated employees.	FE+3		FE+3		FE= Fiscal year end: August 31.		
3.4.002	HR-44	LEAVE STATUS REPORTS - Cumulative report is issued each pay cycle and provides employee leave status information for each position.	FE+3		FE+3	V	FE= Fiscal year end: August 31. V= Vital		
3.4.003	HR-45	LESS THAN FULL-TIME WORKED REPORTS - Dates and hours.	4		4		40 TAC 815.106 (i).		
3.4.004	LSC-22	OVERTIME AUTHORIZATIONS	2		2				
3.4.006	LSC-23	TIME CARDS AND TIME SHEETS	4		4		40 TAC 815.106 (i).		
3.4.007	LSC-24	TIME OFF AND/OR SICK LEAVE REQUESTS	FE+3		FE+3		FE= Fiscal year end: August 31.		
3.4.008	HR-46	SICK LEAVE POOL DOCUMENTATION - Requests submitted, approvals, number of hours transferred in and out, etc.	FE+3		FE+3		FE= Fiscal year end: August 31.		

4.1.001	FIN-06	ACCOUNTS PAYABLE INFORMATION	FE+3		FE+3	FE= Fiscal year end: August 31.		
4.1.002	FIN-07	BILLING DETAIL	FE+3		FE+3	FE= Fiscal year end: August 31. 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	FIN-08	CANCELLED CHECKS / STUBS / WARRANTS / DRAFTS	FE+3		FE+3	FE= Fiscal year end: August 31.		
4.1.004	FIN-09	ENCUMBRANCE DETAIL	FE+3		FE+3	FE= Fiscal year end: August 31.		
4.1.005	FIN-10	INVENTORY AND OTHER COST FILES - Production, job, labor, quotes, pricing, specifications, etc.	FE+3		FE+3	FE= Fiscal year end: August 31.		
4.1.006	FIN-11	INVESTMENT TRANSACTION FILES	FE+3		FE+3	FE= Fiscal year end: August 31.		
4.1.007	FIN-12	TRANSFERS OR BUDGET REVISIONS	FE+3		FE+3	FE= Fiscal year end: August 31.		
4.1.008	FIN-13	ELECTRONIC FUND TRANSFERS - Direct Deposit Registers.	FE+3		FE+3	FE= Fiscal year end: August 31.		
4.2.001	FIN-14	CASH DEPOSIT VOUCHERS - Cash deposit slips.	FE+3		FE+3	FE= Fiscal year end: August 31.		
4.2.002	FIN-15	CASH RECEIPTS - Includes receipts for fees (permits, licenses, renewals, etc.)	FE+3		FE+3	FE= Fiscal year end: August 31.		
4.2.003	FIN-16	DAILY CASH RECEIPT LOGS	FE+3		FE+3	FE= Fiscal year end: August 31.		



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2. Agency code **758 / 788** 3. Agency Name:
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4.2.004	FIN-17	ENCUMBRANCE VOUCHERS - Orders, statements, change orders, etc.	FE+3		FE+3		FE= Fiscal year end: August 31.		
4.2.005	FIN-18	PURCHASE VOUCHERS - Requisitions, orders, receiving reports, invoices, or statements, change orders, best value determinations, etc.	FE+3		FE+3		FE= Fiscal year end: August 31.		
4.2.006	FIN-19	GENERAL JOURNAL VOUCHERS	FE+3		FE+3		FE= Fiscal year end: August 31.		
4.2.007	FIN-20	EXPENDITURE VOUCHERS - Travel, payroll, etc.	FE+3		FE+3		FE= Fiscal year end: August 31.		
4.3.002	FIN-21	RECEIPTS JOURNALS OR REGISTERS	FE+3		FE+3		FE= Fiscal year end: August 31.		
4.3.003	FIN-22	EXPENDITURES JOURNALS OR REGISTERS	FE+3		FE+3		FE= Fiscal year end: August 31.		
4.4.001	FIN-23	GENERAL AND SUBSIDIARY LEDGERS	FE+3		FE+3	V	FE= Fiscal year end: August 31. V= Vital		
4.4.002	FIN-24	ACCOUNTS RECEIVABLE LEDGERS	FE+3		FE+3	V	FE= Fiscal year end: August 31. V= Vital		
4.4.003	FIN-25	ACCOUNTS PAYABLE LEDGERS	FE+3		FE+3		FE= Fiscal year end: August 31.		
4.5.001	FIN-26	WORKSHEETS FOR PREPARING FISCAL REPORTS	FE+3		FE+3		FE= Fiscal year end: August 31.		
4.5.002	FIN-27	INTERNAL FISCAL MANAGEMENT REPORTS - Includes agency monthly budget reports.	FE+3		FE+3		FE= Fiscal year end: August 31.		
4.5.003	FIN-28	ANNUAL FINANCIAL REPORTS - Required by the General Appropriations Act (100 Day Report).	AC+6		AC+6		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 I. 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.		
4.5.006	FIN-29	ANNUAL OPERATING BUDGETS - Required by the General Appropriations Act.	FE+3		FE+3		FE= Fiscal year end: August 31.		
4.6.001	FIN-30	BALANCING RECORDS	FE+3		FE+3		FE= Fiscal year end: August 31.		
4.6.002	FIN-31	RECONCILIATIONS	FE+3		FE+3		FE= Fiscal year end: August 31.		
4.6.003	FIN-32	CASH ACCOUNTS	FE+3		FE+3		FE= Fiscal year end: August 31.		

4.7.001	FIN-33	ACCOUNTING POLICIES AND PROCEDURES MANUAL	US+3		US+3	V	US= Until superseded V= Vital		
4.7.002	FIN-34	BANK STATEMENTS	FE+3		FE+3		FE= Fiscal year end: August 31.		
4.7.003	FIN-35	RETURNED CHECKS / WARRANTS/ DRAFTS (UNCOLLECTABLE)	AC+3		AC+3		AC = After deemed uncollectable.		
4.7.004	FIN-36	CAPITAL ASSET RECORDS	LA+3		LA+3		LA= The record is retained until the disposal of the asset.		
4.7.007	FIN-37	DETAIL CHART OF ACCOUNTS - One for all accounts in use for a fiscal year.	FE+3		FE+3		FE= Fiscal year end: August 31.		
4.7.008	FIN-38	FEDERAL GRANT RECORDS	AC+3		AC+3	V	AC = Satisfaction of all Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments (the Common Rule). V= Vital 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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4.7.011	FIN-39	TEXAS FACILITIES COMMISSION (TFC) STATEMENTS - Charge or bill statements received by agencies from the TFC for services provided.	FE+3		FE+3		FE= Fiscal year end: August 31.		
4.7.012	FIN-40	SIGNATURE AUTHORIZATIONS - Signature cards or similar records establishing authority of an agency employee to initiate or authorize financial transactions on behalf of an agency.	US+ FE+3		US+ FE+3		US= Until superseded FE= Fiscal year end: August 31.		
5.1.001	FIN-41	CONTRACTS AND LEASES - Contracts, leases, and agreements include general obligation, land lease, utilities, and construction except for buildings. Documents include specifications, affidavits of publication of calls for bids, accepted bids, performance bonds, contracts, purchase orders, inspection reports, and correspondence.	AC+4		AC+4	V	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. V= Vital		
5.1.003	PHY-04	DELIVERY REPORTS	2		2				
5.1.004	LSC-25	MAIL AND TELECOMMUNICATIONS LISTINGS - Any mailing address, telephone or fax number, or e-mail address records maintained by an agency on its employees or on entities or persons it serves.	US		US		US= Until superseded		
5.1.005	FIN-42	POSTAGE RECORDS - Records and reports of postage expenses, including postal meter usage.	FE+3		FE+3		FE= Fiscal year end: August 31.		
5.1.007	LSC-26	REQUISITIONS FOR IN-AGENCY / INTER-AGENCY COPY/PRINTING SERVICE - Includes word processing and data processing.	AV		AV		AV= As long as administratively valuable		
5.1.011	LSC-27	PHOTOCOPIER AND TELEFAX USAGE LOGS AND REPORTS	AV		AV		AV= As long as administratively valuable		
5.1.012	FIN-43	CHARGE SCHEDULES/PRICE LISTS - Schedules of prices charged by an agency for services to the public or other agencies, including any documentation used to determine the charges.	US+3		US+3		US= Until superseded		



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5.1.013	FIN-44	INSURANCE POLICIES - For vehicles, equipment, etc	AC+4		AC+4	V	AC = Expiration or termination of the policy according to its terms. V= Vital			
5.1.014	LSC-28	OFFICE PROCEDURES - Any internally distributed manual, guidelines, or similar records that establish standard office procedures for an agency; for example, agency style manuals, telephone protocols, mail room procedures, print shop and photocopy ordering instructions.	US+1		US+1		US= Until superseded			
5.1.015	PHY-05	CORRESPONDENCE TRACKING RECORDS - Any record created by an agency to track any type of incoming and outgoing correspondence or packages by the U.S. Postal Service or by private couriers.	1		1					
5.1.016	LSC-29	TELEPHONE MESSAGE NOTIFICATIONS - Notifications of telephone messages. Includes emails, phone message books and slips, etc.	1		1		NO LONGER USED			
5.1.017	FIN-45	CONTRACT LOG - List of agency contracts, leases, and agreements including general obligation, land lease, utilities, and construction contracts.	FE+3		FE+3		FE= Fiscal year end: August 31.			
5.2.001	FIN-46	APPRAISALS-BUILDING OR PROPERTY	AV		AV	O V	O= Review by Univ. Archives. AV= As long as administratively valuable V= Vital			
5.2.002	FIN-47	BUILDING CONSTRUCTION PROJECT FILES - Planning, design, and construction records; accepted and rejected bids; correspondence; etc.	AC+10		AC+10	O V	O= Review by Univ. Archives. AC=Completion of project V= Vital SEE ALSO item numbers 5.2.003 and 5.2.028			

5.2.003	PHY-06	BUILDING PLANS AND SPECIFICATIONS - Includes architectural and engineering drawings, profiles, and blueprints.	LA/AC+ 2		LA/AC+ 2	O V	<p>O= Review by Univ. Archives. V= Vital LA= The record is retained until disposal of asset (State owned) AC = For leased building; termination or cancellation of lease. ARCHIVES NOTE: Archival Review designation is for state-owned buildings only. SEE ALSO item numbers 5.2.002 and 5.2.028</p>		
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2. Agency code 758 / 788		3. Agency Name: Texas State University System /Lamar State College Port Arthur							
4. Records Series Item No.	5. Agency Item No.	6. Records Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				
5.2.004	FIN-48	BUILDING SPACE REQUESTS	1		1				
5.2.007	FIN-49	DAMAGE REPORTS - Reports of damage to state property.	FE+3		FE+3		FE= Fiscal year end: August 31.		
5.2.008	FIN-50	EQUIPMENT HISTORY FILE; EQUIPMENT SERVICE AGREEMENTS - Agreements or contracts between the agency and equipment vendor to provide maintenance service for equipment. Includes requests for installation, moves, service, etc.; and service/repairs logbooks, etc.	LA+3		LA+3		LA= The record is retained until disposal of asset		
5.2.009	FIN-51	EQUIPMENT INVENTORY DETAIL REPORT FORMS - Updates agency portion of the inventory listing and adds, changes, transfers, or deletes items from inventory.	FE+3		FE+3		FE= Fiscal year end: August 31.		
5.2.010	LSC-29	EQUIPMENT MANUALS	LA		LA		LA= The record is retained until disposal of asset		
5.2.011	LSC-30	EQUIPMENT WARRANTIES	AC+1		AC+1		AC = After expiration of warranty		
5.2.014	FIN-52	INVENTORY-ANNUAL PHYSICAL - Property, equipment, supply verification.	FE+3		FE+3		FE= Fiscal year end: August 31.		
5.2.015	FIN-53	INVENTORY, NOTICES OF EQUIPMENT REMOVED FROM	FE+3		FE+3		FE= Fiscal year end: August 31.		
5.2.016	FIN-54	INVENTORY SYSTEM UPDATE LISTINGS - Listing shows all additions, changes, deletions, and transfer times for the monthly processing period.	AC		AC		AC = transfer of information into annual listing.		
5.2.017	FIN-55	LOST AND STOLEN PROPERTY REPORTS	FE+3		FE+3		FE= Fiscal year end: August 31.		
5.2.018	PHY-07	QUALITY CONTROL REPORTS	2		2				
5.2.019	PHY-08	SERVICE ORDERS - Agency copy of forms completed by mechanical service personnel for installation or repair. Includes billing code, service, labor, parts, and remarks.	1		1				
5.2.020	PHY-09	SUPPLY USAGE RECORDS	FE+1		FE+1		FE= Fiscal year end: August 31.		
5.2.021	FIN-56	SURPLUS PROPERTY SALE REPORTS	FE+3		FE+3		FE= Fiscal year end: August 31.		
5.2.022	FIN-57	UTILITY USAGE REPORTS	AV		AV		AV= As long as administratively valuable		

5.2.023	FIN-58	YEAR-TO-DATE ACTIVITY (INVENTORY LISTING) - Shows additions, changes, transfers, and deletions of information within the inventory system. Data include agency, division, tag number, batch, document, transaction date, location, item code, description, date and cost.	FE+3		FE+3		FE= Fiscal year end: August 31.		
5.2.025	PHY-10	EQUIPMENT DESCRIPTIONS AND SPECIFICATIONS - Set by the agency.	AC+2		AC+2		AC= After Closed (or terminated, completed, expired, or settled)		
5.2.026	LSC-31	FACILITIES RESERVATION LOGS - Reservation logs or similar records relating to the use of agency facilities such as meeting rooms, auditoriums, etc.	2		2				
5.2.027	FIN-59	SPACE UTILIZATION REPORTS	AV		AV		AV= As long as administratively valuable		
5.2.028	FIN-60	BUILDING CONSTRUCTION CONTRACT AND INSPECTION RECORDS - Building construction contracts, surety bonds, and inspection records.	LA+10		LA+10	O V	O= Review by Univ. Archives. V= Vital LA= The record is retained until disposal of asset SEE ALSO item numbers 5.2.002 and 5.2.003.		
5.3.002	FIN-61	FREIGHT BILLS PAID	FE+3		FE+3		FE= Fiscal year end: August 31.		
5.3.003	PHY-11	FREIGHT CLAIMS	AC+2		AC+2		AC = Resolution of claim.		
5.3.005	LSC-32	PACKING SLIPS	AV		AV		AV= As long as administratively valuable		
5.3.007	FIN-62	BID DOCUMENTATION - Includes bid requisition/authorizations, invitations to bid or propose, bid specifications, accepted and rejected bids, and bid tabulation/evaluations.	FE+3		FE+3		FE= Fiscal year end: August 31. 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 numbers 5.1.001 and 5.2.028.		
5.3.008	FIN-63	PURCHASING LOGS - Log, register, etc. providing a record of purchase orders issued, orders received, and similar date on procurement status.	FE+3		FE+3		FE= Fiscal year end: August 31.		



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2. Agency code 758 / 788		3. Agency Name: Texas State University System /Lamar State College Port Arthur								
4. Records Series Item No.	5. Agency Item No.	6. Records Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total					
5.3.009	FIN-64	REQUESTS FOR INFORMATION - Requests for information preliminary to the procurement of goods or services by direct purchase or bid.	AC		AC		AC = Date of direct purchase, issuance of request for bids, or decision not to proceed with procurement, as applicable.			
5.4.002	LSC-33	EVACUATION PLANS - Plans for evacuation of agency facilities in cases of emergency.	US		US		US= Until superseded.			
5.4.003	PHY-12	INSPECTION RECORDS - Fire, safety, and other inspection records of agency facilities and equipment.	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			
5.4.004	PHY-13	FIRE ORDERS - Orders issued by Fire Marshal to correct deficiencies in compliance with the fire code.	AC+3		AC+3		AC= Deficiency corrected.			
5.4.007	PHY-14	HAZARDOUS MATERIALS TRAINING RECORDS - Records of training given employees in an agency hazard communications program.	5		5		Texas Health and Safety Code, Section 502.009(g)			
5.4.008	PHY-15	HAZARD COMMUNICATION PLANS	US+5		US+5	V	US= Until superseded V= Vital Health and Safety Code, Section 502.009(g)			
5.4.009	PHY-16	WORKPLACE CHEMICAL LISTS	30		30		Texas Health and Safety Code, Section 502.005(d)			
5.4.010	PHY-17	MATERIAL SAFETY DATA SHEETS	AC		AC		AC=After sheets are updated or hazardous chemical no longer stored by agency, as applicable.			
5.4.011	PHY-18	VISITOR CONTROL REGISTERS - Logs, registers, or similar records documenting visitors to limited access or restricted areas of agency facilities.	3		3					
5.4.012	PHY-19 IT-14	SECURITY ACCESS RECORDS - Records relating to the issuance or keys, identification cards, building passes, passwords, signed statements or similar instruments of access to agency or state facilities, equipment or automated systems.	AC+2		AC+2	V	AC = Until superseded, date of expiration, or date of termination, whichever sooner. V= Vital			
5.4.013	STU-04	DISASTER PREPAREDNESS AND RECOVERY PLANS	US		US	V	US= Until superseded V= Vital			

5.5.001	IT-15	BILLING DETAIL-TELECOMMUNICATIONS (OTHER THAN TEX-AN) - In addition to summary detail, includes any accompanying detailed listing of long distance calls.	FE+3		FE+3	FE= Fiscal year end: August 31. SEE item number 5.5.006 for TEX-AN billing detail.		
5.5.002	IT-16	LONG DISTANCE TELEPHONE LOGS - Long distance logs created by agencies for internal documentation purposes. Includes any similar logs created for long distance facsimile or electronic transmissions.	AV		AV	AV= As long as administratively valuable		



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2. Agency code 758 / 788		3. Agency Name: Texas State University System /Lamar State College Port Arthur								
4. Records Series Item No.	5. Agency Item No.	6. Records Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total					
5.5.003	IT-17	STATION ACTIVITY REPORTS - Internal listing of incoming/outgoing telephone activity to individual telephone stations.	AV		AV		AV= As long as administratively valuable			
5.5.004	IT-18	SYSTEM ACTIVITY REPORTS - Internal listing of incoming/outgoing agency telephone activity.	AV		AV		AV= As long as administratively valuable			
5.5.007	FIN-65	DISPUTED CALL DOCUMENTATION - Documentation relating to disputed long distance calls, including documents evidencing repayment by employees for personal long distance use.	FE+3		FE+3		FE= Fiscal year end: August 31.			
5.6.003	PHY-21	INSPECTION REPAIR AND MAINTENANCE RECORDS-VEHICLES	LA+1		LA+1		LA= The record is retained until disposal of asset			
5.6.004	HR-48	LICENSE AND DRIVING RECORD CHECKS	AC		AC		AC= Until superseded or until termination of employment			
5.6.005	PHY-22	VEHICLE USE REPORTS - Includes mileage, fuel/oil consumption, passengers carried and other related operational information.	FE+3		FE+3		FE= Fiscal year end: August 31.			
5.6.007	FIN-66	VEHICLE TITLES AND REGISTRATIONS	AC		AC	V	AC = Until vehicle is disposed. V= Vital			
5.6.009	STU-05	PARKING PERMITS OR ASSIGNMENTS	US		US		US= Until superseded			
	AP-01 TP-02	FACULTY GRADE BOOKS	AC		AC		AC = End of academic term			
	AP-02 TP-03	ACADEMIC GRIEVANCE RECORDS	AC+2		AC+2		AC = Closure of complaint review			
	AP-03	CONTINUING EDUCATION COURSES - Non-funded courses.	AC+ 90 days		AC+ 90 days		AC = End of academic term			
	FIN-67	FEE ASSESSMENT AND COLLECTION RECORDS	AC + 3		AC + 3		AC = Termination of enrollment 38 CFR 21.4209 (F) (1)			
	FIN-68	FINANCIAL AID FUND ACCOUNTING RECORDS (FAFAR): ICL, Perkins, CWS, SE0G	AC +5		AC +5		AC = End of award year 34 CFR 673.32 (e) (2); 674.19 (e) (3) (I) ; 675.19 (c) (2) & 676.19(c) (2)			
	FIN-69	FAFAR: PELL GRANTS	AC + 3		AC + 3		AC = End of award year 34 CFR 690.82 (B) (1)			

FIN-70	FAFAR : HEALTH PROFESSION AND NURSING STUDENT LOAN PROGRAMS	AC +3		AC +3	AC = Submission of periodic report 45 CFR 74.21 (a)		
FIN-71	FAFAR: ALL OTHER FEDERAL OR STATE - Federal or state grant, scholarship loan & work study programs	AC+5		AC+5	AC = End of award year		
FIN-72	FAFAR: LOCAL - Local grant, scholarship, loan & work- study programs	FE+3		FE+3	FE= Fiscal year end: August 31.		
LRC-01	GED APPLICATIONS AND RESULTS - Applications for GED testing and result documentations	FE+3		FE+3	FE= Fiscal year end: August 31.		
LRC-02	GED TEST BOOKLET INVENTORY LOGS	2		2			
LRC-03	GED TEST SCORES	PM		PM	PM= Permanent 19 TAC 89 .112(b)		



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2. Agency code **758 / 788** 3. Agency Name:
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4. Records Series Item No.	5. Agency Item No.	6. Records Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				
	STU-06	UNMATCHED TRANSCRIPTS AND ADMISSION/ASSESSMENT DOCUMENTS - Transcripts or other admission or assessment documentation received during an admission period that cannot be matched with an application for admission.	AC+ 90 days		AC+ 90 days		AC = End of admission period		
	STU-07	ADMISSION DENIALS/NON-REGISTRANTS -Records of students denied admission or who were admitted but did not register.	AC+ 90 days		AC+ 90 days		AC = End of academic term		
	STU-08	REGISTERED STUDENTS - Records of students admitted who did register.	AC+ 3		AC+ 3		AC = Termination of enrollment		
	STU-09	LETTERS OF RECOMMENDATION	AC		AC		AC = Until admission or denial of admission.		
	STU-10	ACADEMIC ACTION NOTIFICATIONS	AC+ 3		AC+ 3		AC = Termination of enrollment		
	STU-11	ADVANCED PLACEMENT & CREDIT REPORTS - CREDIT AWARDED	AC+ 3		AC+ 3		AC = Termination of enrollment		
	STU-12	ADVANCED PLACEMENT & CREDIT REPORTS - CREDIT NOT AWARDED	AC+1		AC+1		AC = End of academic term		
	STU-13	COURSE REGISTRATION AND STATUS RECORDS	AC+1		AC+1		AC = End of academic term		
	STU-14	DEGREE PLANS	AC		AC		AC = Termination of enrollment		
	STU-15	GRADE SHEETS - Grade sheets submitted by instructors used in posting grades or credit data to transcripts	AC+5		AC+5		AC = End of academic term		
	STU-16	GRADE REPORTS - Copies of grade reports provided to students	AC+1		AC+1		AC = End of academic year		
	STU-17	GRADE APPEALS/CHANGE REQUESTS	AC+1		AC+1		AC = Decision or change made		
	STU-18	GRADUATION APPLICATIONS AND AUTHORIZATIONS	AC		AC		AC = Until graduated		
	STU-19	GRADUATION LISTS	PM		PM				
	STU-20	HOLDS AND ENCUMBRANCES	AC		AC		AC = Until cleared		
	STU-21	PERSONAL DATA UPDATE RECORDS	AC		AC		AC = Termination of enrollment		
	STU-22	TRANSCRIPTS	PM		PM				
	STU-23	WITHDRAWAL AUTHORIZATIONS	AC+3		AC+3		AC = End of academic year		

		Financial aid application /awards & disbursement/repayment records (as follows):				[Header only not record series.]		
	STU-24	ICL, PERKINS LOAN, CWS, AND SEOG PROGRAMS	AC+5		AC+5	34 CFR 673.22 (e)(2); 674.19(e) (3) (i): 675.19 (c)(2); 676.19 (c)(2) AC = End of award year		
	STU-25	PELL GRANT PROGRAM	AC+5		AC+5	34 CFR 690.82 (B) (1) AC = End of academic year		
	STU-26	STAFFORD AND PLUS PROGRAMS	AC+5		AC+5	34 CFR 682.610 (D)(1) AC = End of academic term		
	STU-27	HEALTH PROFESSIONAL AND NURSING STUDENT LOAN PROGRAMS (INCLUDING HEAL PROGRAM)	AC+5		AC+5	42 CFR 57.215 (b): 57.315(a) (2) ; 60.56 (b) AC = Termination of enrollment		
	STU-28	VA EDUCATIONAL ASSISTANCE ALLOWANCES	AC+3		AC+3	38 CFR 21.4209(F) AC = end of award year		



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			Agency	Storage	Total				
	STU-29	All other federal or state grant, scholarship & work study programs	AC+5		AC+5		AC = End of academic year		
	STU-30	All other federal or state loan programs	AC+5		AC+5		AC = End of award year		
	STU-31	LOCAL GRANT, SCHOLARSHIP, LOAN OR WORK-STUDY PROGRAMS	AC+3		AC+3		AC = End of award year		
	STU-32	FINANCIAL AID REJECTION RECORDS - Records of those who applied for but did not receive financial aid.	AC+1		AC+1		AC = End of academic year		
	STU-33	TUITION EXEMPTION RECORDS	FE+3		FE+3		FE= Fiscal year end: August 31.		
	STU-34	ACCESS POLICIES - Written policies & procedures. Demonstrating how a district meets the requirements of the Family Educational & Privacy Act of 1974 as amended & Federal rules adopted under the Act.	US		US		US= Until superseded		
	STU-35	INFORMATION ACCESS - Documentation of requests from & disclosures to the student, to a school official for legitimate educational interests, to a party with written consent from the student or to a party seeking directory information.	2		2				
	STU-36	INFORMATION ACCESS- NON STUDENT - Documentation of requests from & disclosures to any party not included in STU-36.	PM		PM		PM= Permanent 34 CFR 99.32 (a) (2)		
	STU-37	CONSENT FOR INFORMATION DISCLOSURES - Written consents from the student for information disclosure.	PM		PM		PM= Permanent		
	STU-38	NON-CONSENT FOR INFORMATION DISCLOSURES - Written refusals from the student to the disclosure of directory information valid as long as the student is enrolled.	AC		AC		AC = Termination of enrollment		
	STU-39	PROTEST OF RECORD STATEMENTS - Statements by students concerning information in a student's	PM		PM		PM= As long as the record containing the contested information is maintained		

STU-40	DISCIPLINARY RECORDS RESULTING IN EXPULSION - Records relating to violations that result in expulsion.	3		3		
STU-41	DISCIPLINARY RECORDS-NON EXPULSION - Records relating to all other disciplinary action including investigations that do not result in expulsion.	AV		AV	AV= As long as administratively valuable	
STU-42	ENROLLMENT CENSUS REPORTS	FE+3		FE+3	FE= Fiscal year end: August 31.	
STU-43	PARKING DECAL AND PERMIT RECORDS - Records of fees levied for parking.	FE+3		FE+3	FE= Fiscal year end: August 31.	
STU-44	RECRUITMENT RECORDS	AV		AV	AV= As long as administratively valuable 38 CFR 21.4209 (F) (1) (1 copy only)	
STU-45	ROOM SCHEDULING RECORDS	AV		AV	AV= As long as administratively valuable	
VP-01	STATISTICAL REPORTS	PM		PM	PM= Permanent	
VP-02	ACCREDITATION REPORTS	PM		PM	PM= Permanent	
VP-03	PLANNING RECORDS	AV		AV	AV= As long as administratively valuable	
VP-04	FACULTY ACTIVITY AND ASSIGNMENT RECORDS	3		3		
VP-05	FACULTY DEVELOPMENT LEAVE RECORDS	AC+3		AC+3	AC = Decision made to approve or deny.	
VP-06	PROMOTION AND TENURE RECORDS	AC+2		AC+2	AC = Decision made to approve or deny. 29 CFR 1602.49	
VP-07	CURRICULUM DEVELOPMENT FILES	5		5		