

December 20, 2023



Helena Gawu
Dean of Library Services
Lamar State College Port Arthur-788
PO Box 310 1500 Proctor Street
Port Arthur, Texas 77641

Dear Helena Gawu,

The 5th recertification of your agency's records retention schedule is approved for use as of **12/15/2023**, and it may be accessed on our website at <https://www.tsl.texas.gov/slrn/state/schedules>. Please ensure that all old copies of the schedule are superseded with this certified copy.

This approved retention schedule provides you with continuing authorization to dispose of agency records according to its terms. Please note that state rules (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 according to a timeline established by the Texas State Library and Archives Commission. Your next recertification is scheduled for **12/2028**.

During a certification period, changes may need to be made to your schedule. State rules (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:

Joslyn Ceasar
512-463-5477
jceasar@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

Lorenzo de Zavala
State Archives and
Library Building

1201 Brazos Street
Austin, Texas
78701

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

www.tsl.texas.gov

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TSLAC

Preserving yesterday
Informing today
Inspiring tomorrow



STATE OF TEXAS

Records Retention Schedule Certification

SLR 105C

Form SLR 105 or SLR 122 must accompany all submissions of this form.

Section 1. Agency Information

(Submitting agencies complete this section only)

Agency Code 788
Agency Name Lamar State College- Port Arthur

(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) Helena Gawu
Date 06/13/2023

Section 2. Approvals

(Submitting agencies do not write in this section)

State Auditor's Office
Signature
Name (Print or type) Not Required at This Time
Date

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

Signature [Handwritten Signature]
Name (Print or type) Gloria Meraz
Date 12/15/2023

Cert/Recert No. 5 Amendment No.

CAUTION

A state record with an expired retention period 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 with a retention period that 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.

Amendment Note: If this schedule is amended at any point after certification, updated records series will be indicated by an asterisk (*) preceding the Agency Item Number (AIN).





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SLR 105
Rev. 2021-07

Retention Codes (field 7)

AC – See field 9 for specific records series definition
 AV – Administratively valuable
 CE – Calendar year end

FE – Fiscal year end
 LA – Life of Asset
 PM – Permanent
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Archival Codes (Field 10)

A/I – Transfer to State/University Archivist
 R/O – Review by State/University Archivist
 E – Exempt from archival review and transfer

1. Agency Code:788		2. Agency Name:Lamar State College- Port Arthur									
3. Agency	4. Record Series Item	5. Record Series Title	6. Description	7. Ret. Code	8. Retention			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
FIN-01	1.1.002	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					The State Auditor's Office retains any copies of it audits performed on Texas state agencies.	
FIN-02	1.1.004	LEGISLATIVE APPROPRIATION REQUESTS (LAR)	Including any supporting documentation created and/or used to justify and support legislative appropriations requests by an agency.	AC	6			AC = September 1 of odd-numbered calendar years		ARCHIVES NOTE: The final version of Legislative Appropriation Requests must be submitted to the Texas State Publications Depository Program per 13 TAC 3.3(a)(3)(A). Working files and related documentation used in creating the final plan are not subject to archival review and may be disposed of at the expiration of the retention period.	
LSC-01	1.1.006	COMPLAINT RECORDS AND FEEDBACK	Complaintsand other unsolicited feedback received by an agency from the public concerning the agency and records pertaining to the resolution of the complaint.	AC	2			AC = Date of receipt, action taken, or final disposition of the complaint, whichever later.		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.	



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LSC-02	1.1.007	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				O	<p>O= Review by Univ. Archives. 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.</p> <p>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</p>	



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LSC-03	1.1.008	CORRESPONDENCE-GENERAL	Non-administrative incoming/outgoing and internal correspondence, in any media, including electronic communication, pertaining to or arising from the routine operations of the policies, programs, services, or projects of an agency.		2					SEE comment to item number 1.1.007 SEE ALSO item number 1.1.010	
LSC-04	1.1.010	DIRECTIVES	Any document that officially initiates, rescinds, or amends general office procedures.	US	1					US= Until superseded	
LSC-05	1.1.011	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				A		



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LSC-06	1.1.013	CALENDARS, APPOINTMENT AND ITINERARY RECORDS	Calendars, appointment books or programs and scheduling, or itinerary records, maintained by staff during business hours that document appointments, itineraries, and other activities of agency officials or employees.	CE	1				R	<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 University 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>	



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PRE-01	1.1.014	LEGAL OPINIONS AND ADVICE	From agency legal counsel or the Attorney General, including any requests eliciting the opinions	AV					R	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. ARCHIVES NOTE: Opinions and advice 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.	
STU-01	1.1.019	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				R		
PRE-02	1.1.020	PUBLIC INFORMATION REQUESTS - NOT EXCEPTED	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 = Date request fulfilled or withdrawn.			



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					Years	Months	Days				
PRE-03	1.1.021	PUBLIC INFORMATION REQUESTS - EXCEPTED	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 = Date of notification that records are excepted.			
PRE-04	1.1.023	ORGANIZATION CHARTS	Charts or diagrams that show the structure of an agency and the relationships and relative ranks of its departments and job positions.	US					A	ARCHIVES NOTE: Only charts showing the overall arrangement and administrative structure of the state agency need to be transferred to the Archives and Information Services Division, Texas State Library and Archives Commission. Organizational charts showing division/department level detail are not considered archival.	
LSC-07	1.1.024	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 = Decision made to implement or not implement result of planning process.	R	ARCHIVES NOTE: Data processing planning records are not archival.	
PRE-05	1.1.027	PROPOSED LEGISLATION -	Drafts of proposed legislation and related correspondence.	AV						AV= As long as administratively valuable	



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LSC-08	1.1.038	SURVEYS AND QUESTIONNAIRES	Surveys returned by the customers or clients of an agency and the statistical data maintained rating an agency's performance.	AC				AC = Final disposition of summary report, or date of decision not to produce a report, as applicable.		SEE item number 1.1.067 for summary reports compiled from customer surveys.	
LSC-09	1.1.040	SPEECHES, PAPERS AND PRESENTATIONS	Notes or text of speeches, papers, or reports delivered in conjunction with agency work.	AC	2			AC = End of event, until superseded, or obsolete.	R	ARCHIVES NOTE: Only speeches, papers, and presentations given by or on behalf of executive staff, board or commission members, division directors and program heads require archival review.	
PRE-06	1.1.048	LITIGATION FILES	Records created by or on behalf of an agency in anticipation of or in the adjudication of a lawsuit.	AC	1			AC = As applicable, decision of an agency not to file a lawsuit or decision that a lawsuit will not be filed against it on 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.	O	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. See page ix for more information.	



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					Years	Months	Days				
PRE-07	1.1.055	STRATEGIC PLANS	Information resources and operational strategic plans prepared in accordance with Sections 2054.095 and 2056.002, Government Code.		6			AC = September 1 of odd-numbered calendar years.	I	ARCHIVES NOTE: The final version of Strategic Plans must be submitted to the Texas State Publications Depository Program per 13 TAC 3.3(a)(2)(C). Working files and related documentation used in creating the final plan are not subject to archival review and may be disposed of at the expiration of the retention period.	
PHY-01	1.1.056	ADA (AMERICANS WITH DISABILITIES ACT) DOCUMENTATION	Self evaluations and plans documenting compliance with the requirements of the Americans With Disabilities Act.		3						28 CFR 35.105 (c).



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					Years	Months	Days				
LSC-11	1.1.057	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 ongoing records series. Transitory records are not essential to the fulfillment of statutory obligations or to the documentation of agency functions. See page xii for examples.	AC				AC = Purpose of record has been fulfilled.		CAUTION: Records management officers should make certain records 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 (RSIN 1.2.001) or in records disposition logs (RSIN 1.2.010), but agencies should establish procedures governing disposal of these records as part of its records management plan (RSIN 1.2.014).	



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					Years	Months	Days				
LSC-34	1.1.058	MEETINGS, AGENDAS AND MINUTES OF OPEN	Agendas and minutes of state boards, committees, commissions, and councils that conduct open meetings as required by Chapter 551, Government Code.	PM					I	ARCHIVES NOTE: Agency retains permanent record copy. The archival requirement will be met by sending a copy to the Archives and Information Services Division, Texas State Library and Archives Commission. CAUTION: This records series and RSIN 1.1.059, 1.1.060, 1.1.061, and 1.1.062 must be used for those state boards, committees, commissions, and councils, which by law or the biennial Appropriations Act, are administered by another state agency. These records and all others related to the functions of any of these dependent entities must be included in the records retention schedule of the administering agency.	
LSC-35	1.1.059	MEETINGS, AGENDAS AND MINUTES OF AUDIOVISUAL RECORDINGS OF CLOSED	Agendas, minutes, or audiovisual recordings of closed meetings of state boards, commissions, committees, and councils.	AC	2			AC = The date of the meeting or completion of pending action involving the meeting, whichever is later.			Government Code, 551.104(a).



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					Years	Months	Days				
LSC-36	1.1.062	MEETINGS-SUPPORTING DOCUMENTATION	Documents submitted at meetings of state boards, commissions, committees, and councils, including exhibit items, documentation for agenda items, public comment forms, etc. Includes documents sent in advance of meetings for briefing purposes, some of which may not be submitted at an actual meeting.		2				A	See caution comment at RSIN 1.1.058.	
LSC-12	1.1.063	STAFF MEETING MINUTES AND NOTES	Minutes or notes, and supporting documentation, taken at internal agency staff meetings.		1						
LSC-13	1.1.064	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 performance measures used to manage the agency.	FE	3					See RSIN 1.1.068 for reports on agency performance measures. 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.	
LSC-14	1.1.065	REPORTS AND STUDIES (NON-FISCAL) - RAW DATA	Information or data collected and compiled for the purpose of producing non-fiscal reports.	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.	



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					Years	Months	Days				
PRE-08	1.1.066	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. Includes working files and related documentation used in creating final report.	AC	6			AC= September 1 of odd-numbered calendar years.		ARCHIVES NOTE: The final version of these agency reports must be submitted to the Texas State Publications Depository Program per 13 TAC 3.3. The requirement is met by sending the required copies of the reports to the Texas State Publications Depository Program, Texas State Library and Archives Commission. Working files and related documentation used in creating the final report may be disposed of at the expiration of the retention period.	
PRE-09	1.1.067	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 complied 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				R	CAUTION: Does not include source documentation used for information or data included in or directly related to another records series in this schedule. See RSIN 1.1.064.	



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FIN-03	1.1.068	REPORTS OF PERFORMANCE MEASURES	Quarterly and annual reports on agency performance measures submitted to the executive and legislative budget offices.	AC	6			AC = September 1 of odd - numbered calendar years.			
LSC-15	1.1.069	REPORTS - ACTIVITY	Reports compiled by agency personnel on a daily or other periodic basic pertaining to workload monitoring, task completion times, number of public contacts, and similar activities.		1					CAUTION: See item number 1.1.064.	
LSC-16	1.1.070	AGENCY RULES, POLICIES, AND PROCEDURES	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 = Until superseded, or termination of program, rules, policies, or procedures, whichever applicable.	O	ARCHIVES NOTE: Working files and related documentation used in creating the final rules, policies, and procedures, are not subject to archival requirement and may be disposed of at the expiration of the retention period.	
LIB-01	1.2.001	DESTRUCTION AUTHORIZATIONS	Agency level documents authorizing final disposition of records under a certified records retention schedule.		3					CAUTION: If destruction authorizations are maintained as part of RSIN 1.2.010 (Records Disposition Logs), then longer retention period applies.FE= Fiscal year end: August 31.	



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LSC-18	1.2.003	FORMS HISTORY MAINTENANCE	Print masters of original version and all subsequent revisions to an agency form, including any associated design or design modifcaion requests.	AC	2			AC = Until superseded or use of form is discontinued.			
LIB-02	1.2.005	RECORDS RETENTION SCHEDULE	A records retention schedule (i.e. form SLR 105) that identifies the records that are created and maintained by an agency, provides the minimum timeframes the records must be retained, and includes instructions for their disposition. This series may include working files and documentation of certification and approval by the Texas State Library and Archives Commission.	US						Original is retained for 50 years by the State and Local Records Management Division, Texas State Library and Archives Commission.	
LIB-04	1.2.010	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					CAUTION: Disposition can mean destroyed or transferred.	
LSC-19	1.2.012	RECORDS INVENTORIES	Worksheets or working papers used to capture records inventory information, including location tracking and to document existence and requirements of a records series.	US							



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LIB-05	1.2.013	RECORDS ACCESS LOCATOR AIDS	Documentation used to provide and improve access to records.Includes indexes, card files, shelf lists, registers, guides, etc.	AC				AC = When aid is superseded, or no longer needed because associated records have been destroyed.		CAUTION: These records must carry the same retention period and archival code of the records they support.	
LIB-06	1.2.014	RECORDS MANAGEMENT POLICIES AND PROCEDURES	Records management plans and similar records that establish the policies and precedures under which records and information are managed in an agency.	US	1						
PHY-02	1.2.015	DISASTER RECOVERY SERVICE TRANSMITTALS	Also includes documentation for disaster recovery services provided by other entities.	AV							
PHY-03	1.2.016	DISASTER RECOVERY SERVICE APPROVAL FORM	Forms used by TSLAC (e.g. form RMD 113) or other entities to establish disaster recovery services, authorize agency staff to access the media, etc.	AC				AC= Until superseded or termination of service.			



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STU-02	1.3.001	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= 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)	



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STU-03	1.3.002	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					O	ARCHIVES NOTE: Successive and substantive drafts of major publications may be archival. Major is defined by both the publication's authorship and its impact on Texas and Texans. Original artwork, including photo prints and negatives that have significant value as evidence of agency programs as well as the potential for re-use, may be archival.	
IT-02	2.1.002	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 = Until electronic records are transferred to and made usable in a new system environment, or there are no electronic records being retained to meet an approved retention period established in this schedule that require the use of the system		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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IT-03	2.1.007	SOFTWARE PROGRAMS	Automated software applications and operating systems files including job control language, program listing/source code, etc	AC				AC = Until electronic records are transferred to and made usable in a new software environment or there are no electronic records being retained to meet an approved retention period that require the software to be retrieved and read.		CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.	13 TAC 6.94.
IT-04	2.1.008	COMPUTER 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 = Until electronic records are transferred to and made usable in a new software environment or there are no electronic records being retained to meet an approved retention period that require the software to be retrieved and read.		CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.	13 TAC 6.94.



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IT-05	2.1.009	HARDWARE AND SOFTWARE 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, purpose, structure, logical relationships, and origin of the data elements.	AC				AC = Until electronic records are transferred to and made usable in a new software environment or there are no electronic records being retained to meet an approved retention period that require the software to be retrieved and read.		CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.	13 TAC 6.94.



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IT-07	2.1.010	AUDIT TRAILS	Files needed for electronic data audits. Records include but are not limited to: reports showing transactions accepted, rejected, suspended, and/or processed; history files or tapes; records of updates to application files; and security logs.	AC				AC = All audit requirements have been met.			
IT-08	2.2.011	DATA INPUT DOCUMENTS	Forms and logs used to reconcile batches submitted for processing against batches received and processed.	AC				AC = Data entered into applicable system and, if required, verified.			
IT-10	2.2.013	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= No longer needed as an audit trail for any records modified.			



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IT-11	2.2.014	INTERNET BROWSER FILES	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						The disposal of internet history records need not be documented through destruction authorizations (RSIN 1.2.001) or in records disposition logs (RSIN 1.2.010), but agencies should establish procedures governing disposal of these records as part of its records management plan (RSIN 1.2.014).	
IT-13	2.2.016	SOFTWARE REGISTRATIONS, WARRANTIES AND LICENSE AGREEMENT	Records documenting the registration and licensing of a software application to activate the software for legal use by the end users of a state agency, along with warranties providing that the software will perform in accordance with functional specifications.	LA	3						
HR-01	3.1.001	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.	AC	2			AC = Date of the making of the record or the personnel action involved, whichever occurs late			29 CFR 1602.49 (a)



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HR-02	3.1.002	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 = Termination of employment			
HR-03	3.1.006	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 = Termination of counseling			
HR-04	3.1.011	EMPLOYEE BENEFITS	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	3			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.	
HR-06a	3.1.013a	EMPLOYMENT CONTRACTS– 9/1/2015 AND AFTER	Includes a contract or agreement regarding the terms and conditions of employment of an individual and a contract with a vendor for temporary staffing services.	AC	7			AC = Expiration or termination of the contract according to its terms			Government Code 441.1855.



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					Years	Months	Days				
HR-06b	3.1.013b	EMPLOYMENT CONTRACTS– 8/31/2015 AND PRIOR	Includes a contract or agreement regarding the terms and conditions of employment of an individual and a contract with a vendor for temporary staffing services.	AC	4			AC = Expiration or termination of the contract according to its terms.			Government Code 441.1855.
HR-07	3.1.014	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; and all other records that document the selection process, except for those noted in Remarks.	AC	2			AC = Date of the making of the record or the personnel action involved, whichever occurs later.		CAUTION: Does not include criminal history checks. SEE item number 3.1.026.	29 CFR 1602.49 (a)
HR-08	3.1.018	GRIEVANCE RECORDS -	Records relating to the review of employee grievances or complaints against personnel policies, working conditions, etc.	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	
HR-09	3.1.019	PERFORMANCE APPRAISALS	Job evaluations, performance appraisals, or other similar documents used to evaluate the performance of an employee.		2						29 CFR 1620.32 (c)



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HR-10	3.1.020	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.	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 minimum retention period described by item number 3.1.021.	



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HR-11	3.1.021	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 = Termination of employment			
HR-12	3.1.022	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						29 CFR 1602.49 (a)
HR-13	3.1.023	POSITION/JOB DESCRIPTIONS	Job descriptions, including all associated task or skill statements, for positions in an agency.	AC	4			AC= Until superseded or job eliminated.			40 TAC 815.106 (i)



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HR-14	3.1.026	CRIMINAL HISTORY CHECKS	Criminal history record information on job applicants or agency employee obtained from the Department of Public Safety (DPS).	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.	
LSC-20	3.1.027	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 = Termination of employment			
HR-15	3.1.029	EMPLOYMENT ELIGIBILITY, DOCUMENTATION	Federal reporting form (I-9).	AC				AC = 3 years after date of hire or 1 year after termination of employment, whichever later.			8 CFR 274a.2(b)(2)(i)(A) and (c)(2).
HR-17	3.1.037	EMPLOYEE RECOGNITION RECORDS	Awards, incentives, tenure, etc.	AC	5			AC = Termination of Employment			



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HR-18	3.1.038	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						CAUTION: Most recent public access election information must be kept as long as the former employee verification records. See RSIN 3.3.011.	
HR-19	3.2.001	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 = After termination of employee or after admendment, expiration or termination of authorization, whichever sooner.			
HR-20	3.2.002	EMPLOYEE EARNINGS RECORDS	Payroll records and registers documenting employee earnings, wages, and pay. This may include but is not limited to payroll input records, summary statements, payroll vouchers, payroll detail sheets, and payroll history.		4						40 TAC 815.106 (i)
HR-21	3.2.003	FEDERAL TAX RECORDS	Includes 1099.W2.FICA and other tax records.	AC	4			AC= Tax due date, date the claim is filed, or date tax is paid, whichever is later			26 CFR 31.6001-1(e)(2)



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HR-22	3.2.004	INCOME ADJUSTMENT AUTHORIZATIONS	Used to make increases or decreases to employees' gross pay, FICA, retirement, or in the computation of taxes.		2						29 CFR 516.6 (c)
HR-23	3.2.005	W-4 FORMS	Employer's copy of "Employee's Withholding Exemption Certificate."	AC	4						26 CFR 31.6001-1 (e)(2)
HR-24	3.2.006	WAGE RATE TABLES	Records defining the wage or salary rate for each position in the agency expressed in dollars, grades, or step numbers.		2						29 CFR 516.6(a) (2)
FIN-04	3.2.007	UNEMPLOYMENT COMPENSATION RECORDS	Records and documentation relating to unemployment compensation claims, including reimbursement of funds disbursed by Texas Workforce Commission (TWC).	AC	5			AC = Termination of Employment			
HR-25	3.2.008	DIRECT DEPOSIT APPLICATION/AUTHORIZATIONS	Forms used to deposit employee's earnings into a specified personal account.	AC				AC = Until superseded, cancelled, or last payment deposited after termination of employment, whichever applicable.			
HR-26	3.2.009	STATE DEFERRED COMPENSATION RECORDS	Records documenting the amount of pension or deferred compensation earned by individual employees.	AC	4						
HR-29	3.3.004	BENEFIT PLANS	Employee benefit plans such as pension; life, health, and disability insurance; deferred compensation; etc., including amendments.	AC	1			AC = Until superseded or plan terminated.			29 CFR 1627.3(b)(2)



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HR-30	3.3.010	LABOR STATISTICS REPORTS	Reports providing statistical information on labor force.		3						
HR-31	3.3.011	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 = Termination of employment		See item number 3.1.038.	
HR-32	3.3.015	POSITIONS/JOB CLASSIFICATION REVIEW FILE	Records relating to review and monitoring of job classifications within an agency.	US	3						
LSC-21	3.3.020	WORK SCHEDULES/ASSIGNMENTS	Work, duty, shift, crew, or case schedules, rosters, or assignments.	AV							
HR-33	3.3.022	TEXAS WORKFORCE COMMISSION (TWC) REPORTS	Reports to the agency from TWC or its predecessor pertaining to employees.		3						
FIN-05	3.3.023	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= Fiscal year end: August 31.	



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HR-40	3.3.030	INTERNAL 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.	AC	2			AC = Close of training session, after training materials superseded, or termination of training program, as applicable.		See RSIN 3.1.027 for individual employee training records. CAUTION: Does not include hazardous material training records. See RSIN 5.4.007.	
HR-41	3.3.031	EEO REPORTS AND SUPPORTING DOCUMENTATION	Includes documentation used to complete EEO reports.		3						29 CFR 1602.32, 1602.39, 1602.41, 1602.48, and 1602.50.
HR-42	3.3.032	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						29 CFR 1620.32©
HR-43	3.4.001	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						
HR-44	3.4.002	LEAVE STATUS REPORTS	Cumulative report is issued each pay cycle and provides employee leave status information for each position.	FE	3				V	FE= Fiscal year end: August 31. V= Vital	



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LSC-22	3.4.004	OVERTIME AUTHORIZATIONS	Records created to schedule time worked by employees outside of or in addition to their regular working hours, including approval authorizations.		2					CAUTION:Only includes overtime schedules and authorizations.	
LSC-23	3.4.006	TIME AND ATTENDANCE RECORDS	Records documenting individual employee's hours worked, including work schedules and documentation evidencing adherence to or deviation from normal hours for those employees working on fixed schedules.		4					40 TAC 815.106 (i).	
LSC-24	3.4.007	TIME OFF AND/OR SICK LEAVE REQUESTS	Records documenting individual employee's hours worked, including work schedules and documentation evidencing adherence to or deviation from normal hours for those employees working on fixed schedules.	FE	3						Government Code, Section 661.152(d); 29 CFR 825.500(b).
HR-46	3.4.008	SICK LEAVE POOL DOCUMENTATION	Requests submitted, approvals, number of hours transferred in and out, etc.	FE	3					FE= Fiscal year end: August 31.	



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FIN-06	4.1.001	ACCOUNTS PAYABLE INFORMATION	Bill copies or stubs, statements, billing registers, account cards, deposit warrants, cash receipts, credit card receipts, receipts books, cash transfers, daily cash reports, reconciliations, general journal vouchers, special vouchers, and similar records that serve to document money owed to or received by a state agency and its collection or receipt.	FE	3					FE= Fiscal year end: August 31.	
FIN-11	4.1.006	INVESTMENT TRANSACTION FILES	Records documenting the investment of any public funds that evidence the investment of such funds, the cancellation or withdrawal of investments, and similar activities.	FE	5					See RSIN 4.5.002 for reports associated with investments.	
FIN-24	4.1.009	ACCOUNTS RECEIVABLE INFORMATION	Bill copies or stubs, statements, billing registers, account cards, deposit warrants, cash receipts, credit card receipts, receipts books, cash transfers, daily cash reports, reconciliations, general journal vouchers, special vouchers, and similar records that serve to document money owed to or received by a state agency and its collection or receipt.	FE	3						



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FIN-27	4.5.002	FISCAL MANAGEMENT REPORTS	Internal and external periodic fiscal management reports and associated worksheets, including federal financial reports, salary reports, HUB reports, investment performance reports, etc.	FE	5					This series does not include fiscal reports created to fulfill grant requirements. See RSIN 4.7.008.	
FIN-28	4.5.003	ANNUAL FINANCIAL REPORTS	Annual Financial Reports (AFR) required by the General Appropriations Act (100 Day Report).	AC	6			AC = September 1 of odd-numbered calendar years.		ARCHIVES NOTE: The final version of Annual Financial Reports must be submitted to the Texas State Publications Depository Program per 13 TAC 3.3(a)(2)(a). Working files and related documentation used in creating the final plan are not subject to archival review and may be disposed of at the expiration of the retention period.	
FIN-33	4.7.001	ACCOUNTING POLICIES AND PROCEDURES MANUAL	Records documenting the internal and external procedural requirements with respect to the accounting department of a state agency.	US	3						
FIN-35	4.7.003	UNCOLLECTIBLE ACCOUNTS	Records of accounts deemed uncollectible, including write-off authorizations and returned checks, warrants, and drafts.	AC	3			AC = Date account deemed uncollectable.			



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FIN-36	4.7.004	CAPITAL ASSET RECORDS	Documentation relating to the capital and fixed assets of a state agency, including equipment or property history cards containing data on initial cost, depreciation schedules or summaries used for capital outlay budgeting, and property sale, auction, or disposal records of agency owned equipment and property.	LA	3						
FIN-38a	4.7.008 a	GRANT RECORDS-AWARDED	This series documents state, federal, and other sponsored grant projects participated in or administered by state agencies. It includes grant authorization records, which provide evidence of the award of grants to or by agencies; grant/project financial or performance reports, which are periodic reports of financial activity and/or program performance related to grants received or made by agencies.	AC	3			AC = Satisfaction of all Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments (the Common Rule).		CAUTION: If an agency does not produce a biennial or annual narrative report as described in RSIN 1.1.066, then these annual financial reports must be marked with Archival Code A. The archival requirement, when a biennial or annual narrative report is not produced, is met by sending the required copies of the reports to the Texas State Publications Depository Program, Texas State Library and Archives Commission.	
FIN-38b	4.7.008 b	GRANT RECORDS-NON-AWARDED	Non-awarded, denied, or unfunded grant applications and proposals.	AC	2			AC = Date of notification.			



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FIN-40	4.7.012	SIGNATURE AUTHORIZATIONS	Signature cards or similar records establishing authority of an agency employee to initiate or authorize financial transactions on behalf of an agency.	AC	4			AC = Until superseded, date of expiration, or termination of employee, whichever sooner.			
FIN-34	4.8.001	BANKING RECORDS	Bank statements, credit card statements, cancelled checks, check registers, deposit slips, debit and credit notices, reconciliations, and other banking related records.	FE	3						
FIN-41	5.1.001b	CONTRACTS ADMINISTRATION FILES- 8/31/2015	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, performance bonds, contracts, purchase orders, inspection reports, and correspondence. May also include other applicable documentation in the master contract file per Texas Comptroller of Public Accounts Contract Management Guide.	AC	4			AC = Expiration or termination of the instrument according to its terms.		See related RSIN 5.3.007a/b/c for bid documentation. See RSIN 5.2.028 for building construction contracts. See RSIN 5.1.017 for contract logs. NOTE: Refer to SB20 (84th Leg.) for retention period context.	Government Code, 441.1855.
PHY-04	5.1.003	DELIVERY REPORTS	Records documenting incoming or outgoing deliveries, including through private courier services.		2						



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LSC-25	5.1.004	MAIL AND TELECOMMUNICATIONS LISTINGS	Any mailing address, telephone or fax num	US							
FIN-42	5.1.005	POSTAGE RECORDS	Records and reports of postage expenses, including postal meter usage.	FE	3						
LSC-26	5.1.007	REQUISITIONS FOR IN-AGENCY / INTER-AGENCY COPY/PRINTING SERVICE -	Includes word processing and data processing.	AV							
LSC-27	5.1.011	PHOTOCOPIER AND TELEFAX USAGE LOGS AND REPORTS	Registers or logs of print copies and fax transmissions made by user or in total.	AV				AV= As long as administratively valuable			
FIN-43	5.1.012	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= Until superseded	



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FIN-44a	5.1.013a	INSURANCE POLICIES-9/1/2015	Liability, theft, fire, health, life, automobile, and other policies for government property and personnel including supporting documentation relevant to the implementation, modification, renewal, or replacement of policies. Executed, renewed, or amended on or after September 1, 2015.	AC	7			AC = Expiration or termination of the policy according to its terms			Government Code, 441.1855.
FIN-44b	5.1.013b	INSURANCE POLICIES 8/31/2015 AND PRIOR	Liability, theft, fire, health, life, automobile, and other policies for government property and personnel including supporting documentation relevant to the implementation, modification, renewal, or replacement of policies.	AC	4			AC = Expiration or termination of the policy according to its terms.			Government Code, 441.1855.
LSC-28	5.1.014	OFFICE PROCEDURES	Any internally distributed manual, guidelines, or similar records that establish standard office procedures for an agency, e.g. agency style manuals, telephone protocols, mail room procedures, print shop and photocopy ordering instructions.	US	1						



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PHY-05	5.1.015	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 (USPS) or by private couriersexecuted, renewed, or amended on or before August 31, 2015.		1						
FIN-45	5.1.017	CONTRACT LOG -	List of agency contracts, leases, and agreements including general obligation, land lease, utilities, and construction contracts.	FE	3						
FIN-46	5.2.001	APPRAISALS-BUILDING OR PROPERTY	Assessments or evaluations of the value of state-owned buildings or property.	AV					O		
FIN-47	5.2.002	BUILDING CONSTRUCTION PROJECT FILES	Project records related to planning, design, construction, conversion, or modernization of state facilities, structures, infrastructure, and systems, including feasibility, screening, and implementation studies; topographical and soil surveys and reports; as-builts; laboratory test reports; environmental impact statements; correspondence; successful and unsuccessful bid documentation and other related documentation.	AC	10			AC=Completion of project	O	ARCHIVES NOTE: Archival review designation is for state-owned buildings only.	



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PHY-06	5.2.003a	BUILDING PLANS AND SPECIFICATIONS- STATE OWNED	Includes architectural and engineering drawings, profiles, and blueprints of planning, design, construction, conversion, or modernization of state-owned facilities, structures, infrastructure, and systems.	LA					0		
PHY-48	5.2.004	BUILDING SPACE REQUESTS	Records documenting building space requests and approvals. Information on request forms may include but is not limited to: the building and room; the reason for the change; parties involved in the request; date of request and approval. Includes documents related to third party usage of space on campus.		1						
FIN-49	5.2.006	INVENTORY AND PROPERTY CONTORL RECORDS	Records documenting the inventorying, maintenance, usage, checkout, and disposal of supplies, equipment, and property of a state agency. Includes lost, stolen, and damage reports.	FE	3						
FIN-50	5.2.008	INSPECTION, REPAIR, AND MAINTENANCE-EQUIPMENT	Equipment history file, which may include logbooks and requests for installation, moves, service, repair, etc.	LA	3						
LSC-29	5.2.010	EQUIPMENT MANUALS		LA							



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					Years	Months	Days				
LSC-30	5.2.011	EQUIPMENT WARRANTIES		AC	1			AC = After expiration of warranty			
FIN-54	5.2.016	INVENTORY SYSTEM UPDATE LISTINGS	Listing shows all additions, changes, deletions, and transfer times for the monthly processing period.	AC				AC = transfer of information into annual listing.			
PHY-07	5.2.018	QUALITY CONTROL REPORTS	Documentation and reporting on adherence to procedures that ensure quality of a process, product, or service.		2						
PHY-08	5.2.019	SERVICE ORDERS	Agency copy of forms completed by mechanical service personnel for installation or repair. Includes billing code, service, labor, parts, and remarks.		1						
PHY-10	5.2.024	EQUIPMENT DESCRIPTIONS AND SPECIFICATIONS	Equipment and material descriptions and specifications that may include but are not limited to detailed descriptions; lists of raw materials and ingredients; physical characteristics of items; special handling procedures; or technical drawings.	AC	2			AC = Equipment or material is no longer in the agency.			
LSC-31	5.2.026	FACILITIES RESERVATION LOGS	Reservation logs or similar records relating to the use of agency facilities such as meeting rooms, auditoriums, etc.		2						



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FIN-59	5.2.027	SPACE UTILIZATION REPORTS	Reports summarizing efficiency of facility space utilization, which may include data on room usage, demand, allocation, and capacity.	AV							
FIN-60	5.2.028	BUILDING CONSTRUCTION CONTRACT AND INSPECTION RECORDS	Building construction contracts, surety bonds, and inspection records.	LA	10				R		
PHY-11	5.3.003	FREIGHT CLAIMS	Freight or cargo claims against carrier for damage or loss to a shipment.	AC	2			AC = Resolution of claim.			43 TAC 218.61(d); 49 USC 14706(e).
FIN-62	5.3.007 b	BID DOCUMENTATION-8/31/2015 AND PRIOR	Includes bid requisition/authorizations, invitations to bid or propose, bid specifications, awarded and unawarded bids, and bid tabulation /evaluations.Includes bid requisition/authorizations, invitations to bid or propose, bid specifications, awarded and unawarded bids, and bid tabulation /evaluations. Associated with a contract executed, renewed, or amended on or before August 31, 2015.	FE	3			AC = Date of notification of denial or date of withdrawal, as applicable.			Government Code, 441.1855.



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FIN-63	5.3.008	PURCHASING LOGS	Log, register, etc., providing a record of purchase orders issued, orders received, and similar data on procurement status.	FE	3						
FIN-64	5.3.009	REQUESTS FOR INFORMATION	Requests for information preliminary to the procurement of goods or services by direct purchase or bid.	AC				AC = Decision not to proceed with the procurement.		CAUTION: If the request for information leads to request for proposal or bid, the request for information documentation should be retained in accordance with RSIN 5.3.007a/b/c.	
LSC-33	5.4.002	EVACUATION PLANS	Plans for evacuation of agency facilities in cases of emergency.	US							
PHY-12	5.4.003	SAFETY DRILL AND INSPECTION RECORDS	Fire, safety, and emergency drill, alarm, and other inspection records of agency facilities and equipment, including orders issued by inspectors to correct deficiencies in compliance with any code or regulations	AC	3			AC = Date of drill, alarm, inspection, or date of the correction of deficiency, whichever applicable.		CAUTION: Does not include inspection reports of building construction. SEE item number 5.2.028.	
PHY-14	5.4.007	HAZARDOUS MATERIALS TRAINING RECORDS	Records of training given to employees in an agency hazard communications program. May include but is not limited to date of class, roster of attendees, subjects covered, and instructors.		5						Texas Health and Safety Code, 502.009(g)



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PHY-15	5.4.008	HAZARD COMMUNICATION PLANS	Plan that provides information to employees about the hazardous chemicals to which they may be exposed to in their workplace.	US	5						Texas Health and Safety Code, 502.009(g)
PHY-16	5.4.009	WORKPLACE CHEMICAL LISTS	List of each hazardous chemical normally present in the workplace.		30						Texas Health and Safety Code, 502.009(g)
PHY-17	5.4.010	SAFETY DATA SHEETS	Safety Data Sheets (SDS) that list information relating to occupational safety and health for the use of various substances and products.	AC				AC=After sheets are updated or hazardous chemical no longer stored by agency, as applicable.			29 CFR 1910.1020(d)(1)(ii)(B)
PHY-18	5.4.011	VISITOR CONTROL REGISTERS	Logs, registers, or similar records documenting visitors to limited access or restricted areas of agency facilities.		3						
PHY-19	5.4.012	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 = Until superseded, date of expiration, or date of termination, whichever sooner			
STU-04	5.4.013	CONTINUITY OF OPERATIONS PLANS (COOP)	Plans developed (per Texas Labor Code, 412.054) to mitigate the damage of potential events that could endanger an agency's ability to function. Includes disaster preparedness, response, and recovery plans.	US						See RSIN 5.4.017 for records related to responding or recovering from an emergency.	



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IT-16	5.5.002	TELEPHONE ACTIVITY RECORDS	Telephone logs created for internal documentation purposes; station activity reports of internal listings of incoming/outgoing telephone activity to individual telephone stations; operator call transfers; summary detail reports; and system activity reports of internal listings of all incoming/outgoing agency telephone activity.	AV							
FIN-65	5.5.007	DISPUTED CALL DOCUMENTATION	Documentation relating to disputed long distance calls, including documents evidencing repayment by employees for personal long distance use.	AC	3			AC = Dispute resolved or repaid + FE.			
PHY-21	5.6.003	INSPECTION REPAIR AND MAINTENANCE RECORDS-VEHICLES	Records and documentation related to inspections, repairs, and maintenance for state vehicles.	LA	1					See RSIN 5.2.008 for non-vehicle equipment maintenance records.	
HR-48	5.6.004	LICENSE AND DRIVING RECORD CHECKS		AC				AC= Until superseded or until termination of employment			
PHY-22	5.6.005	VEHICLE USE REPORTS	Includes mileage, fuel/oil consumption, passengers carried and other related operational information.	FE	3						
FIN-66	5.6.007	VEHICLE TITLES AND REGISTRATIONS	Vehicle titles, registration information, and owner manuals for state vehicles.	LA							



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3. Agency	4. Record Series Item	5. Record Series Title	6. Description	7. Ret. Code	8. Retention			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
STU-05	5.6.009	PARKING PERMITS OR ASSIGNMENTS	Records documenting issuance of parking permits and assignments.	US							
AP-01	15.2.011	FACULTY GRADE BOOKS	Faculty grade books showing students' performance in the course and work completed. Includes grade sheets and other materials that permit a reconstruction of a student's graded performance in a course.	AC				AC = Expiration of grade appeal period.		See RSIN 15.2.012 for official Registrar copies of grades.	
AP-02	15.5.008	STUDENT GRIEVANCE RECORDS	Grievances brought forward by students against the institutions which do not result in litigation. Grievances may pertain to academic issues; housing; affirmative action and equal opportunity; student conduct; and other issues. May include but not limited to: notices of grievance; informal discussion notes; grievance responses; formal hearing notes (including audio tapes); final summary statements; settlement agreements; and appeals documentation.	AC	5			AC = Graduation or date of last attendance.			



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					Years	Months	Days				
FIN-68	15.3.002	FINANCIAL AID APPLICATION, AWARD, AND DISBURSEMENT RECORDS—ALL FEDERAL, STATE, LOCAL, AND INSTITUTIONAL GRANTS, SCHOLARSHIPS, AND WORK-STUDY PROGRAMS	Approved student applications and disbursement records for all local, state, federal, or institutional grants, scholarships, and work-study programs not covered elsewhere in schedule. May include but not limited to: financial aid need analysis and eligibility forms; financial aid transcripts; copies of documents submitted by students or parents for verification of student aid application information; receipts; account cards; copies of promissory notes; certifications of enrollment status or other data to grantors; work-study certifications and time reports; documentation of entrance and exit interviews; and correspondence. Includes Federal Work-Study (FWS), Federal Supplemental Educational Opportunity Grant (FSEOG), and Pell Grant records.	AC	3			AC = End of the award period, or submission of annual report for the award year, whichever later			34 CFR 668.24(e), 34 CFR 675.19(b)(1), 34 CFR 676.19(b), 34 CFR 690.82(a).



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					Years	Months	Days				
LRC-03	15.5.005	RECRUITMENT RECORDS	Recruitment of students based upon disadvantaged status, academic performance, and other criteria. May include but not limited to: interview notes; conversation notes; personal information forms and resumes; test scores; photographs; and academic transcripts.	PM						PM= Permanent 19 TAC 89 .112(b)	
STU-07	15.1.002	ADMISSION RECORDS-NOT ENROLLED DENIED	Denied applications or applications that were approved but applicant did not enroll in institution or program (includes international applicants). May include but not limited to: acceptance letters; applications for admission; entrance exam reports; letters of recommendation; health history forms; readmission forms; recruitment materials; test scores; residency classification forms; transcripts from other colleges; and transcripts from high school.	AC	1			AC = End of application term.		CAUTION: International student academic records must be retained at least 1 year after final notice to USCIS.	



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					Years	Months	Days				
STU-08	15.1.001	ADMISSION RECORDS-ENROLLED-ACCEPTED	Applications and supplemental materials submitted by individuals, including international students, seeking admission and enrolling in the institution or a university program. May include but not limited to: acceptance letters; applications for admission; entrance exam reports; letters of recommendation; health history forms; readmission forms; recruitment materials; test scores; residency classification forms; transcripts from other colleges; and transcripts from high school.	AC	3			AC = Graduation, date of last attendance, or separation from program, as applicable.		CAUTION: International student academic records must be retained at least 1 year after final notice to USCIS.	8 CFR 214.3(g).
STU-10	15.2.001	ACADEMIC ACTION AUTHORIZATIONS	Authorizations for academic actions, such as academic probation, suspensions, dismissals, reinstatements, etc.	AC	3			AC = Graduation or date of last attendance.			



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STU-11	15.2.002	ADVANCED PLACEMENT & CREDIT RECORDS - AWARDED	Transfer credit evaluations, national or state standardized test scores and reports (e.g., CLEP, AP, Departmental, IB, SAT II, DSST), credit by examination authorizations and reports, military course documentation (e.g., USAFI) and evaluations, non-traditional transcripts and credentials, life experience records, requests for advanced credit, and similar documentation used by a university to evaluate and determine award of credit by advanced placement.	AC	3			AC= Graduation or date last attendance			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-12	15.2.003	ADVANCED PLACEMENT & CREDIT RECORDS - NOT AWARDED	Denied requests for transfer credits and/or advanced placement.	AC	1			AC = End of academic term			34 CFR 668.24(e), 34 CFR 674.19(e)(3), 34 CFR 682.610(a)(2).



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					Years	Months	Days				
STU-13	15.2.007	COURSE REGISTRATION AND STATUS RECORDS	Registration forms, class rosters, class schedules, and similar records providing information on which courses students are registered for at the beginning of an academic term, including documentation evidencing the conditions under which courses are undertaken (e.g., audit, pass/fail, and credit/no credit authorizations or approvals) or evidencing changes to registration status during the term (e.g., add/drop forms and withdrawal authorizations by student or instructor).	AV							
STU-15	15.2.012	ORIGINAL GRADE SHEETS AND GRADE CHANGES	Grade sheets submitted by instructors used in posting grades or credit data to transcripts	PM						CAUTION: This retention period applies to records of the Registrar. See RSIN 15.2.011 for departmental copies of grade sheets.	



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					Years	Months	Days				
STU-16	15.2.013	STUDENT COURSEWORK AND GRADE REPORTS	Student coursework (e.g., examinations, quizzes, papers) in custody of institution that is needed as supporting documentation for grade books and grade report cards distributed to students.	AC	1			AC = Course completion.		CAUTION: Coursework under dispute may not be destroyed until the resolution of the dispute. See RSIN 15.2.009 for graduate student qualifying examinations. See RSIN 15.2.011 for grade book. See RSIN 15.2.030 for theses and dissertations.	
STU-18	15.2.014	GRADUATION AND DIPLOMA ADMINISTRATION	Student applications for graduation, degree audit forms, graduation authorizations, and diploma distribution records.	AC	1			AC = Graduation or last date of attendance.			
STU-20	15.2.019	HOLDS AND ENCUMBRANCES	Documents used to place and remove holds on registration, student services, or the release of transcripts or other academic data until the subject of the hold/encumbrance takes a specific action.	AC				AC = Date of release.			



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					Years	Months	Days				
STU-21	15.2.023	PERSONAL DATA AND NAME CHANGE RECORDS	Student or applicant name changes, change of address forms, race/ethnicity questionnaires, and similar source documentation used to update personal data information on transcripts or other student records.	PM							
STU-22	15.2.032	TRANSCRIPTS	Transcript, or a record equivalent in function, of the academic achievement of each enrolled student, documenting courses taken, credits granted, grades received, and any degrees or certifications awarded (including any narrative assessments or evaluations prepared in lieu of an assigned grade).	PM							



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					Years	Months	Days				
STU-23	15.2.007	COURSE REGISTRATION AND STATUS RECORDS	Registration forms, class rosters, class schedules, and similar records providing information on which courses students are registered for at the beginning of an academic term, including documentation evidencing the conditions under which courses are undertaken (e.g., audit, pass/fail, and credit/no credit authorizations or approvals) or evidencing changes to registration status during the term (e.g., add/drop forms and withdrawal authorizations by student or instructor).	AV							



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					Years	Months	Days				
STU-24	15.3.002	FINANCIAL AID APPLICATION , AWARDS & DISBURSEMENT ALL FEDERAL, STATE, LOCAL AND INSTITUTIONAL GRANTS SCHOLARSHIPS.AND WORK-STUDY PROGRAMS	Approved student applications and disbursement records for all local, state, federal, or institutional grants, scholarships, and work-study programs not covered elsewhere in schedule. May include but not limited to: financial aid need analysis and eligibility forms; financial aid transcripts; copies of documents submitted by students or parents for verification of student aid application information; receipts; account cards; copies of promissory notes; certifications of enrollment status or other data to grantors; work-study certifications and time reports; documentation of entrance and exit interviews; and correspondence. Includes Federal Work-Study (FWS), Federal Supplemental Educational Opportunity Grant (FSEOG), and Pell Grant records.	AC	3			AC = End of the award period, or submission of annual report for the award year, whichever later.			34 CFR 668.24(e), 34 CFR 675.19(b)(1), 34 CFR 676.19(b), 34 CFR 690.82(a).



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					Years	Months	Days				
STU-25	15.3.003	FINANCIAL AID APPLICATION , AWARDS & DISBURSEMENT ALL FEDERAL, STATE, LOCAL AND INSTITUTIONAL LOAN PROGRAMS	Financial aid applications for federal, state, local, or institutional loans not included elsewhere in schedule, including Income Contingent Loans (ICL), Perkins Loans, Federal Family Education Program Loans (Stafford Loans, Unsubsidized Stafford Loans, Federal PLUS Loans, and Federal Consolidation Loans) and Direct Loans (Direct Unsubsidized Loans, Direct PLUS Loans, and Direct Consolidation Loans). May include but not limited to: approved student applications; Student Aid Report (SAR) or institutional Student Information Record (ISIR) used to determine eligibility for Title IV, HEA program funds; documentation of each student's or parent borrower's eligibility; loan counseling; and data verification forms and reports.	AC	3			AC = End of the award period, or submission of annual report for the award year, whichever later.			34 CFR 668.24(e), 34 CFR 674.19(e)(3), 34 CFR 682.610(a)(2).
STU-27	15.3.005	FINANCIAL AID APPLICATION AND AWARD RECORDS-HEALTH PROFESSION AND NURSING STUDENT LOAN PROGRAMS	Approved student applications; documentation of financial aid; financial aid transcript; student's name, address, academic standing, and period of attendance; and loan and tuition details.	AC	5			AC = Termination of enrollment			42 CFR 57.215 (b): 57.315(a) (2) ; 60.56 (b)



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					Years	Months	Days				
STU-28	15.3.010	FINANACIAL AID DISBURSEMENT AND REPAYMENT RECORDS- VETERANS ADMINISTRATION EDUCATION ASSISTANCE ALLOWANCES	Approved student applications and disbursement records for Veterans Administration (VA) benefits. May include but not limited to: financial aid need analysis and eligibility forms; financial aid transcripts; copies of documents submitted by students for verification of student aid application information; receipts; account cards; copies of promissory notes; certifications of enrollment status or other data to grantors; and documentation of entrance and exit interviews.	AC	3			AC = Termination of enrollment.			38 CFR 21.4209(f).
FIN-70	15.3.018	FINANCIAL AID DISBURSEMENT AND REPAYMENT RECORDS- HEALTH PROFESSION AND NURSING STUDENT LOAN PROGRAMS	Disbursement and repayment records for health profession and nursing student loans. May include but not limited to: documentation of amount and date of each loan, payment dates, deferment documentation, and correspondence related to overdue and uncollectible loans.	AC	5			AC = Date of retirement of loan.		CAUTION: May include obsolete Health Education Assistance Loans (HEAL).	42 CFR 57.215(c), 42 CFR 57.315(a)(3).



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					Years	Months	Days				
STU-33	15.3.027	TUITION EXEMPTION AND REMISSION RECORDS	Applications for and supporting documentation evidencing the grant of tuition exemptions or remissions. May include but not limited to: authorizations; reconciled lists; and account summaries.	AC	3			AC = End of award year			
STU-34	15.4.003	DISCLOSURES	Record of each request for access to and each disclosure of personally identifiable information from the educational records of a student under the Family Educational Rights and Privacy Act (FERPA): documentation of requests from and disclosures to any party other than the student, an official of the university for what the university has determined are legitimate educational interests, a party with or without written consent from the student, or a party seeking directory information.	AC				AC = As long as disclosed record is maintained.			34 CFR 99.32(a)(2).
STU-35	15.4.002	ACCESS WAIVER RECORDS	Waivers completed by students to allow or revoke access to confidential letters and confidential statements of recommendation	AC				AC = Final disposition of record to which waiver applies.			



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STU-37	15.4.007	WRITTEN CONSENTS	Written consents and waivers for information disclosure from the eligible student or student's parents.	PM						PM= Permanent	
STU-38	15.4.006	STUDENT NON-DISCLOSURES REQUEST	Student request to opt out of directory information disclosure.	AC				AC = Termination of enrollment			34 CFR 99.21(c)(1).
STU-39	15.4.004	PROTEST OF RECORD STATEMENTS	Statements by students commenting on contested information in a student record stating why he or she disagrees with a university's decision not to amend a record, or both.	AC				AC = Final disposition of record containing the contested information.			34 CFR 99.21(c)(1).
STU-40	15.5.007	STUDENT CONDUCT/ DISCIPLINARY ACTION RECORDS	Academic dishonesty and conduct violations among students. May include but not limited to: incidents reports; final reports; evidence; notification of allegation; disciplinary reports; informal discussion notes; formal hearing notes; final summary statements; decision statements; and appeals documentation.	AC	3			AC = Graduation or date of last attendance.			
STU-42	15.2.010	ENROLLMENT CENSUS REPORTS (4th and 12th Class Day Rosters)	Attendance reports prepared by faculty on class census day and used as source documentation for enrollment reports submitted to the Texas Higher Education Coordinating Board (THECB).	FE	3					FE= Fiscal year end: August 31.	



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					Years	Months	Days				
STU-44	15.5.005	RECRUITMENT RECORDS	Recruitment of students based upon disadvantaged status, academic performance, and other criteria. May include but not limited to: interview notes; conversation notes; personal information forms and resumes; test scores; photographs; and academic transcripts.	AV						AV= As long as administratively valuable 38 CFR 21.4209 (F) (1) (1 copy only)	
STU-45	15.2.026	FACILITIES RESERVATION LOGS	Reservation logs or similar records relating to the use of agency facilities such as meeting rooms, auditoriums, etc.		2						
VP-01	15.5.002	ADMISSION/ENROLLMENT REPORTS	Summary and statistical information relating to student admission programs which may be used for control, planning or review. May include but not limited to: Texas Higher Education Coordination Board (THECB) report; reports sent to administration; or beginning of semester enrollment reports sent to office of institutional research.	PM							



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VP-02	17.2.002	PROFESSIONAL ACCREDITATION REPORTS	Final accreditation report issued by a professional accreditation board for the institution, colleges, units, and related programs. May include but not limited to: final self-evaluation submitted to accreditation board; final accreditation report issued by accreditation board, and any supporting documentation needed to provide context for accreditation report.	PM					0		
VP-03	17.1.012	DEGREE AND SPECIAL ACADEMIC PROGRAM PROPOSAL, DEVELOPMENT AND REVIEW RECORDS	Records documenting planning and discussions relating to the implementation of new undergraduate, advanced degree, and special academic programs and any major reorganization or changes to established programs. May include but not limited to: final reports; curriculum committee meeting minutes; curriculum proposals; reviews of individual degree programs by campus and off-campus sources; letters of support; review agendas; and related documentation.	AC				AC = Termination of degree program.	0		



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					Years	Months	Days				
VP-06	12.1.001	FACULTY TENURE RECORDS	Evaluations, recommendations, and similar documentation relating to the review process for tenure for all faculty or staff in the tenure track.	AC	2			AC = Decision made to approve or deny.			29 CFR 1602.49
VP-07	17.1.009	COURSE RECORDS	Records of departmental course offerings and individual course contents. May include but not limited to: syllabi; course descriptions; course outlines; course summaries; course requests and proposals; curriculum approval lists; lists of classes by term; bibliographies; reading lists; course announcements; and handout materials.	AC	2			AC = End of semester in which course is taught.			Texas Education Code, 51.974.
AP-03	17.1.006	CONTINUING EDUCATION COURSES	For-credit and not-for-credit course offerings and individual course contents as offered by Continuing Education (i.e., extension classes).	AC	2			AC = End of semester in which course is taught.		CAUTION: Some of these records may affect accreditation and should be kept long enough to meet accreditation cycle requirement.	