

August 28, 2023



Paige Neumann  
Executive Assistant  
Texas Historical Commission-808  
1511 Colorado St.  
Austin, Texas 78701

Dear Paige Neumann,

**Amendment 3** of the 6th recertification of your agency's records retention schedule is approved for use as of **8/24/2023** and may be accessed on our website at <https://www.tsl.texas.gov/slrn/state/schedules>. Please maintain this amendment with your currently approved schedule so that it can be easily referenced.

We appreciate your efforts in maintaining an up-to-date schedule. Making additions and changes to your schedule as you identify them not only ensures the integrity of your recordkeeping practices, but keeps your agency in compliance with state rules (13 TAC §6.4) requiring the submission of any needed amendments to a retention schedule during its certification period to keep the information in the schedule current.

We will notify you of the date your schedule is due for recertification. Any additional approved amendments to your schedule, such as this one, should be incorporated into your main retention schedule prior to submitting it for recertification.

Thank you again for your commitment to complying with state records management laws and regulations. If we can provide any assistance to you, please contact the Government Information Analyst assigned to your agency:

Joslyn Ceasar  
512-463-5477  
jceasar@tsl.texas.gov

Sincerely,

*Megan Casey*  
*on behalf of 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](http://www.tsl.texas.gov)

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TEXAS STATE  
**LIBRARY  
ARCHIVES**  
COMMISSION

STATE OF TEXAS

**Records Retention Schedule Certification**

SLR 105C

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

**Section 1. Agency Information**

*(Submitting agencies complete this section only)*

Agency Code 808  
Agency Name Texas Historical Commission

*(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 Paige Neumann

Name (Print or type) Paige Neumann

Date June 30, 2023

**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 Gloria Mera  
Name (Print or type) Gloria Mera  
Date 8-24-23

Cert/Recert No. 6 Amendment No. 3

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# 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).





# STATE OF TEXAS Records Retention Schedule

SLR 105  
Rev. 2021-07

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AC – See field 9 for specific records series definition  
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 LA – Life of Asset  
 PM – Permanent  
 US – Until Superseded

### 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

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3. Agency Item No.	4. Record Series Item No.	5. Record Series Title	6. Description	7. Ret. Code	8. Retention Period			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
<b>ACCOUNTING DEPARTMENT (AC)</b>											
AC1	1.1.002	Audits	External Audits & review performed by agency/external.	AC	7			AC = Publication or release of final audit findings.		The record copy of any audit performed by the State Auditor's Office is retained permanently by that agency.	
AC2	1.1.004	Legislative Appropriations Requests	Including supporting documentation.	AC	6			AC = September 1 of odd-numbered calendar years.		Copies sent to Publications Depository Program TSLAC fulfills the Archival Mandate. Sending the LAR to the Texas Publications Depository of the TSLAC fulfills the Archival Requirement	



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AC4a	1.1.007	Correspondence — Administrative	Incoming/outgoing & internal correspondence pertaining to formulation, planning, implementation interpretation modification, or redefinition of the programs, services, or projects of the Accounting Division (Staff Services) of the THC and the administrative regulations, policies, and procedures that govern them.		4				R	CAUTION: This records series and item number 1.1.008 should be used only for correspondence not included in or directly related to another records series on the THC's approved schedule. For example, a memo that documents an appropriations request must be retained for minimum retention period prescribed by item no. 1.1.004; a letter concerning an audit for that prescribed by item number 1.1.002, etc. ARCHIVES NOTE: Only administrative correspondence of executive staff, board or commission members, division directors and program heads require archival review Contact the State Archives when these records have met their retention periods.	



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AC4b	1.1.008	Correspondence – General	Non-administrative incoming/outgoing & internal correspondence, in any media, pertaining to or arising from routine operations of the policies, programs, services, or projects of the Accounting Division (Staff Services) of the THC.		2					See comment to RSIN 1.1.007. See also RSIN 1.1.010.	
AC5a	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 procedures that govern an agency's programs, services, or projects. Includes working files and related documentation used in creating rules, policies, and procedures.	AC	3			AC= Until superseded or termination of program, rules, policies or procedures.	R	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.	
AC6	1.1.027	Proposed Legislation	Includes Fiscal Notes.	AC	3			AC = 2 years from date of proposal			
AC7	1.1.069	Reports – Activity	Reports compiled by agency personnel on a daily or other periodic basis.		1						
AC8	1.1.068	Reports – Reports on Performance Measures	Semi-annual and annual. Includes agency performance measures documents.	AC	6			AC=September 1 of odd-numbered calendar years.			



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AC9	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.	
AC10A	1.2.001	Destruction Authorizations	Documents authorizing final disposition of records under a certified records retention schedule. Records may also include destruction authorizations (e.g. form RMD 102) approved by Texas State Library and Archives Commission.	FE	3						
AC10B	1.2.005	Records Retention Schedule (RRS)	Staff Services' (aka "Accounting Dept") section only. 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						Original is retained for 50 years by the State and Local Records Management Division, Texas State Library and Archives Commission.	
AC10C	1.2.006	Records Transmittal Forms	Convenience copies for Accounting/Staff Services Div. only (includes RMD 101, Tx-R-5, 306-58-1, and Agency Storage Forms). Forms indicate records transferred to storage or a transfer of legal custody.	AC	2			AC = Date of authorization for destruction, permanent transfer from storage, or transfer to the Archives and Information Services Division, Texas State Library and Archives Commission, by the agency records management officer.			



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AC10E	1.2.010	Records Disposition Logs	Logs or similar records listing records of Staff Services Div./Accounting Dept. destroyed or transferred to the Archives and Information Services Division, Texas State Library and Archives Commission, showing records series title, dates of records, and date destroyed or transferred.		10					Disposition can mean destroyed or transferred.	
AC10F	1.2.011	Record Center Storage Approval Forms (RMD 106)	Accounting/Staff Services retains convenience copies.	AV						Obsolete record.	
AC10G	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. Accounting/Staff Services retains convenience copies.	US						Obsolete record.	
AC11	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 neither included in nor directly related to other records series in this schedule.	AC	3			AC = Decision made to implement or not the result of planning process.	R	ARCHIVES NOTE: Data processing planning records are not archival.	
AC26	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).



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AC27	3.2.003	Federal Tax Records	Includes 1099, W-2, FICA, and other tax records.	AC	4			AC = Tax due date, date claim is filed, or date tax is paid whichever is later.			26 CFR 31.6001-1 (e) (2).
AC38	4.1.009	Accounts Receivable Information	Includes Cash deposits, deposit log, Purchase Vouchers, including requisitions, orders, receiving reports, invoices, or statements, change orders, best value determinations, etc. General Journal Vouchers, Expenditure Vouchers including Travel, payroll, etc.	FE	3					*=All audit requirements will be met.	
AC45	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, Comptroller Statements, etc.	FE	5					Send required copies to the State Library. CAUTION: This series does not include fiscal reports created to fulfill grant requirements. See RSIN 4.7.008.	
AC48	4.9.001	Annual Operating Budget	Required by the General Appropriations Act. Includes encumbrances and documentation about budget transfers and revisions, as well as detail charts of accounts.	FE	3					*=All audit requirements will be met.	
AC53	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					*=All audit requirements will be met.	



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AC54	4.7.005	Claim Files	Records documenting requests for payment of a sum of money according to the terms of a policy or contract.	AC	3			AC=Resolution of claim.			
AC56	4.7.008	Grant Records	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: Retention requirements may vary depending on the specific funding agency. Records in this series may be subject to Government Code 441.1855. Agencies must ensure that records are retained for the appropriate retention period.	



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AC58a	5.1.001a	Contract Administration Files - 9/1/2015 and After	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. Executed, renewed, or amended on or after September 1, 2015.	AC	7			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.	SB20 (84th Leg.)



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AC58b	5.1.001b	Contract Administration Files - 8/31/2015 and Prior	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. Executed, renewed, or amended on or before August 31, 2015.	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.	SB20 (84th Leg.)
AC59	5.1.005	Postage Expense Reports	Records and reports of postage expenses, including postal meter usage.	FE	3					*=All audit requirements will be met.	
AC61	5.2.008	Inspection, Repair, and Maintenance Records – Equipment	Equipment history file, which may include logbooks and requests for installation, moves, service agreements, repair, manuals, warranty, etc.	LA	3					*=All audit requirements will be met.	
AC69A	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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AC70	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							
AC71	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).
AC73a	5.3.007 a	Bid Documentation – 9/1/2015 and After	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 after September 1, 2015.	AC	7			AC= Expiration or termination of the instrument according to its terms or decision not to proceed with the bid.		CAUTION: If a formal written contract is the result of a successful bid or request for proposal and its supporting documentation must be retained for the same period as the contract. SEE item number 5.1.001(FI-IC Staff Services Division Agency Item No. AC58 - Contracts & Leases) and 5.2.028 (TX RRS -. Bldg. Construction Contract & Inspection Records).	SB20 (84th Leg.)
AC73b	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. Associated with a contract executed, renewed, or amended on or before August 31, 2015.	FE	3						SB20 (84th Leg.)



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AC73c	5.3.007c	Bid Documentation – Invalid Bids	Invalid bids that do not meet agency submission requirements and are not included in bid evaluation process (e.g. withdrawn, missed submission deadline, incomplete submission, etc.)	AC	2			AC= Date of notification of denial or date of withdrawal, as applicable.			
AC74	5.4.003	Inspection Records	Fire, safety, 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 = Inspection, or date of the correction of the deficiency if the inspection report reveals the deficiency.		CAUTION: Does not include inspection reports of building construction. See RSIN 5.2.028.	
AC75	5.6.005	Vehicle Use Reports	Includes mileage, fuel/oil consumption, passengers carried and other related operational information.	FE	3					*=All audit requirements will be met.	



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AC78	1.1.057	Transitory Information	Records of temporary usefulness that are not an integral part of a records series of an agency and are not essential to the fulfillment of statutory obligations or to the documentation of agency functions. Some examples of transitory information, which can be in any medium (voice mail, fax, email, hard copy, etc.) are routine messages; telephone message notifications; internal meeting notices; routing slips; incoming letters or memoranda of transmittal that add nothing of substance to enclosures; and similar routine information used for communication, but not for the documentation, of a specific agency transaction.	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).	
AC79	1.1.006	Complaint Records	Received by the THC Staff Services Division from the public concerning the THC Staff Services Division/Accounting Department & records pertaining to the resolution of the complaint.	AC	2			AC= Date of receipt, action taken, or final disposition of the complaint, whichever comes last		CAUTION: If a complaint becomes subject of litigation (such as a lawsuit, it must be included in and is subject to minimum retention period of item number 1.1.048.	



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AC80	1.1.020	Open Records Requests – Approved/Denied	Includes all correspondence and documentation relating to requests for records that are furnished to the public under the Public Information Act (Chapter 552, Government Code). Also includes withdrawn requests.	AC	2			AC = Date request fulfilled or date of notification that records are exempt.		"Includes RSIN 1.1.021"	
AC81	3.2.005	W4 Forms	Employer's copy of "Employee's Withholding Exemption Certificate."	AC	4			AC= Until superseded, obsolete, or termination of employment.		26 CFR 31.6001-1 (e)(2).	
AC82	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.			
AC83	3.4.004	Overtime Schedules and 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. See RSIN 3.4.006 for timekeeping records.	
AC84	4.1.001	Accounts Payable Information	Claims; invoices; statements; copies of checks and purchase orders; expenditure authorizations; ledgers; encumbrance, purchase, general journal, expenditure, and special vouchers; and similar records that serve to document disbursements, including those documenting claims for and reimbursement to employees for travel and other expenses.	FE	3						



# STATE OF TEXAS Records Retention Schedule

SLR 105  
Rev. 2021-07

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A/I – Transfer to State/University Archivist  
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					Years	Months	Days				
AC86	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						
AC87	5.2.006	Inventory and Property Control Records	Records documenting the inventorying, maintenance, usage, and disposal of supplies, equipment, and property of a state agency. Includes lost, stolen, and damage reports.	FE	3						
<b>ARCHEOLOGY DIVISION (AD)</b>											
AD1	1.1	Monthly/Quarterly Work Records	Support Documentation Only.	AC	5			AC=Resolution of all questions arising from a reporting period.			
AD2A	1.2.001	Destruction Authorizations	Archeology Division level documents authorizing final disposition of records under a certified records retention schedule.	FE	3					THC Administration retains agency copies. Archeology Division keeps convenience copies for division use.	
AD2B	1.2.005	Records Retentions Schedule (SLR 105) Archeology Division's section 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						Original is retained by the State and Local Records Management Division, Texas State Library and Archives Commission. THC Administration retains official agency copy of entire THC RRS.	



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Rev. 2021-07

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AD2C	1.2.006	Records Transmittal Forms	Archeology Division copies (includes RMD 101, Tx-R-5, 306-58-1, and Agency Storage Forms). Forms indicated records transferred to storage or a transfer of legal custody.	AC	2			AC=Date of authorization for destruction, permanent transfer from storage, or transfer to the Archives and Information Services Division, Texas State Library and Archives Commission, by the agency records management officer.		Administration retains all agency copies.	
AD2E	1.2.010	Records Disposition Logs.	Logs or similar records listing records destroyed or transferred to the Archives and Information Services Division, Texas State Library and Archives Commission, showing records series title, dates of records, and date destroyed or transferred.		10						
AD2F	1.2.011	Record Center Storage Approval Forms (RMD 106)	Archeology Division's Copy	US						THC Administration Division retains agency copy.	
AD2G	1.2.012	Records Inventory Worksheets	Archeology Division's convenience copies only	US						THC Administration Division retains agency copy.	



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SLR 105  
Rev. 2021-07

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AD3a	1.1.008	Correspondence — General	Non-administrative incoming/outgoing & internal correspondence, in any media, pertaining to or arising from routine operations of the policies, programs, services, or projects of the Archeology Division of the THC.		4					IMPORTANT: These optical disk cartridges will remain with division Tracking Coordinator. CAUTION: Records series item no. 1.1.007 and item number 1.1.008 should be used only for correspondence not included in or directly related to another records series on the THC's approved schedule. For example, a memo that documents an appropriations request must be retained for minimum retention period prescribed by item no. 1.1.004; a letter concerning an audit for that prescribed by item number 1.1.002, etc. SEE ALSO items no. 1.1.010	



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Rev. 2021-07

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					Years	Months	Days				
AD3b	1.1.007	Correspondence — Administrative	Incoming/outgoing & internal correspondence pertaining to formulation, planning, implementation, interpretation, modification, or redefinition of the programs, services, or projects of the Archeology Division of the THC and the administrative regulations, policies, and procedures that govern them.		6				R	CAUTION: Records series item no. 1.1.007 and item number 1.1.008 should be used only for correspondence not included in or directly related to another records series on the THC's approved schedule. For example, a memo that documents an appropriations request must be retained for minimum retention period prescribed by item no. 1.1.004; a letter concerning an audit for that prescribed by item number 1.1.002, etc. SEE ALSO items no. 1.1.011. ARCHIVES NOTE: Only administrative correspondence of executive staff, board or commission members, division directors and program heads require archival review Contact the State Archives when these records have met their retention periods.	



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SLR 105  
Rev. 2021-07

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					Years	Months	Days				
AD4	1.1.014	Legal opinions and Advice (from AG's Office).		AV					R	<p>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.</p> <p>CAUTION: Does not include legal opinions or advice rendered on a matter in litigation or with regard to pending litigation, or opinions rendered for Public Information Act Requests. See RSIN 1.1.048, 1.1.020, and 1.1.021. Office of the Atty. Gen. retains copies permanently.</p>	
AD5a	1.1.070	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 the THC that sets out the rules, policies and procedures that govern THC programs, services, or projects.	AC	3			AC = Until superseded, or termination of program, rules, policies or procedures.	R	<p>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.</p>	



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Rev. 2021-07

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					Years	Months	Days				
AD6	1.1.058	Texas Antiquities Advisory Board Meeting Agenda and Minutes	Official agenda of state boards, committees, commissions	PM					A	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. Agency of origin retains permanent record copy. The archival requirement met by sending copy to TSLAC.	
AD7	1.1.062	Texas Antiquities Advisory Board Meeting Agendas & 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	AC	15			AC= Approval of the formal minutes by the Antiquities Advisory Board	A	See caution comment at RSIN 1.1.058	
AD8	1.1.065	Reports, Studies, & Surveys – Raw Data	state boards, commissions,	AV	30					Paper, Microfilm	



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Rev. 2021-07

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					Years	Months	Days				
AD9	1.3.002	Publication Development Files	committees, and councils, including	AV					R	Paper, photographs, & artworks remain agency until value ceases been transferred to TSLAC. See RSIN 1.3.001 for final State Publications created from development files. 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.	
AD10	3.1.013	Employment Contracts	exhibit items, documentation for	AC	7			AC=Expiration or termination of contract according to its terms.			SB20 (84th Leg.)
AD11	3.3	Archeology Division Personnel Records ONLY	agenda items, public comment forms,	AC	6			AC=Termination of Employment.		Convenience copies only, not original documents.	
AD12		Archeological Sites Files	etc. Includes documents sent in	AV					A	Remain at agency until they cease to have frequent admin/research use. Then transfer to the TSLAC.	



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					Years	Months	Days				
AD13		Stewardship Program Files	advance of meetings for briefing	US	25				A	Remain at agency actually ceased to have frequent admin/research news. Been transferred to the TSLAC.	
AD14		Outreach, Public Service, Presentations and Training Files.	purposes, some of which may not be		30					Includes TAM (Texas Archeology Month) material.	
AD15		Section 106 Review Scanned Records	submitted at an actual meeting.		10				A	Tracking coordinator has just that go to storage (*see note above). Reviews scanned & paper tracks. Criteria for selection to be scanned: 106 Projects that are 15 pages last, except with: 1. Unreadable maps/documentations; 2. Bulk maps; 3. Photographs; 4. Reports; 5. TAC Permitted Projects; 6. Relation to ongoing projects. Be safe to optical disk cartridges. Documentation of substantial changes/work done published a report that set to the Publications Depository will fulfill the archival requirement.	
AD16		Americans with Disabilities Act: Comment Made (not Final)			15						



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					Years	Months	Days				
AD17		Americans with Disabilities Act: No Comment Made or Final Review			10						
AD18		Bureau of Indian Affairs: Comment Made (not Final)			15						
AD19		Bureau of Indian Affairs: No Comment Made or Final Review			10						
AD20		Bureau of Land Management: Comment Made (not Final)			25						
AD21		Bureau of Land Management: No Comment Made or Final Review			10						
AD22		Bureau of Reclamation: Comment Made (not Final)	Section 106 Project Reviews of proposed actions for potential impacts to historic archeological sites, and other properties of historical significance.	CE	20						
AD23		Bureau of Reclamation: No Comment Made or Final Review			10						
AD24		Coast Guard, US: Comment Made (not Final)			15						



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					Years	Months	Days				
AD25		Coast Guard, US: No Comment Made or Final Review			10						
AD26		Albuquerque District CORPS OF ENGINEERS, DISTRICT OF: Public Notices & Projects, Comment Made		AC	15			AC=Determine Inactive.			
AD27		Albuquerque District CORPS OF ENGINEERS, DISTRICT OF: Public Notices & Projects, No Comment Made			10						
AD28		CORPS OF ENGINEERS, DISTRICT OF: GALVESTON, Comment Made	Section 106 Project Reviews of proposed actions for potential impacts to historic buildings, archeological sites, and other properties of historical significance (some of these projects are on-going and are maintained at the agency until after closed, terminated, completed, expired or settled.	CE	25						
AD29		Galveston District CORPS OF ENGINEERS, DISTRICT OF: Public Notices & Projects, No Comment Made			15						



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					Years	Months	Days				
AD30		Corps OF ENGINEERS, DISTRICT OF: Fort Worth: Comment Made	Section 106 Project Reviews of proposed actions for potential impacts to historic buildings, archeological sites, and other properties of historical significance (some of these projects are on-going and are maintained at the agency until after closed, terminated, completed, expired or settled).	AC	25			AC=Determine Inactive			
AD31		CORPS OF ENGINEERS, DISTRICT OF: FORT WORTH: No Comment Made	Section 106 Project Reviews of proposed actions for potential impacts to historic buildings, archeological sites, and other properties of historical significance (some of these projects are on-going and are maintained at the agency until after closed, terminated, completed, expired or settled).	CE	25						
AD32		New Orleans District CORPS OF ENGINEERS, DISTRICT OF: Public Notices & Projects, Comment Made		AC	15			AC=Determine Inactive			
AD33		New Orleans District CORPS OF ENGINEERS, DISTRICT OF: Public Notices & Projects, No Comment Made			10						



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					Years	Months	Days				
AD34		Southwest District CORPS OF ENGINEERS, DISTRICT OF: Public Notices & Projects, Comment Made		AC	15			AC=Determine Inactive			
AD35		Southwest District CORPS OF ENGINEERS, DISTRICT OF: Public Notices & Projects, No Comment Made			10						
AD36		Tulsa District CORPS OF ENGINEERS, DISTRICT OF: Public Notices & Projects, Comment Made		AC	15			AC=Determine Inactive			
AD37		Tulsa District CORPS OF ENGINEERS, DISTRICT OF: Public Notices & Projects, No Comment Made			10						
AD38		Customs, US: Public Notices & Projects, (Not Final)			15						
AD39		Customs, US: No Comment Made or Final Review			10						
AD40		Department of the Army: Comment Made (not Final)			35				E		



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					Years	Months	Days				
AD41		Department of the Army: No Comment Made or Final Review	Section 106 Project Reviews of proposed actions for potential impacts to historic buildings, archeological sites, and other properties of historical significance	CE	35						
AD42		Department of the Army: Plans/Maps/Drawings		AC	30			AC=Determine Inactive.	E		
AD43		Department of the Air Force: Comment Made (not Final)		AC	35				E		
AD44		Department of the Air Force: No Comment Made or Final Review			15						
AD45		Department of the Air Force: Plans/Maps/Drawings		AC	30			AC=Determine Inactive	E		
AD46		Department of the Navy: Comment Made (not Final)		AC	35			AC= Determine Inactive	E		
AD47		Department of the Navy: No Comment Made or Final Review			35						
AD48		Department of the Navy: Plans/Maps/Drawings		AC	30			AC=Determine Inactive	E		
AD49		Department of Commerce: Comment Made (not Final)			15						



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AD50		Department of Commerce: No Comment Made or Final Review			10						
AD51		Department of Education: Comment Made (not Final)			25						
AD52		Department of Education: No Comment Made or Final Review			10						
AD53		Department of Energy (FERC/NRC): Comment Made (not Final)			25					NRC = Nuclear Energy Regulatory Comm.	
AD54		Department of Energy (FERC/NRC): No Comment Mae or Final Review			10					NRC=Nuclear Energy Regulatory Comm.	
AD55		Department of Health (US and/or State): Comment Made (not Final)			25						
AD56		Department of Health (US and/or State): No Comment Made or Final Review			10						
*AD57		Dept of Justice (TCDJ or TYC) plans/maps/drawings	plans/maps/drawings		10						



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AD58		Department of Justice (TDCJ or TYC): No Comment Made or Final Review			10						
AD59		Department of Treasury: Comment Made (not Final)			15						
AD60		Department of Treasury: No Comment Made or Final Review			10						
AD61		Economic Development Administration: Major Projects/Rehabs or Acquisition		AC	20			AC=Determine Inactive	E		
AD62		Economic Development Administration: Comment Made/Small Projects			25				E		
AD63		Economic Development Administration: No Comment Made/Small Projects/Final			10						
AD64		Economic Development Administration: Review Plans/Maps/Drawings		AC	20			AC=Determine Inactive.	E		



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Rev. 2021-07

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AD65		Environmental Protection Agency: Major Projects		AC	30			AC=Determine Inactive.	E		
AD66		Environmental Protection Agency: Comment Made - Permit Actions			25				E		
AD67		Environmental Protection Agency: No Comment Made - Permit Actions/Final Review			10						
AD68		Economic & Community Develop, Rural: Comment Made (not Final)			25						
AD69		Economic & Community Develop, Rural: No Comment Made or Final Review			10						
AD70		Federal Aviation Administration: Comment Made (not Final)			30						
AD71		Economic & Community Develop, Rural: No Comment Made or Final Review			10						



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					Years	Months	Days				
AD72		Federal Communication Commission: Comment Made (not Final)			35						
AD73		Federal Communication Commission: No Comment Made or Final Review			15						
AD74		Federal Deposit Insurance Corp: Comment Made (not Final)			25						
AD75		Federal Deposit Insurance Corp: No Comment Made or Final Review			10						
*AD76		Federal Emergency Management Admin plans/maps/drawings	plans/maps/drawings		10						
AD77		Federal Emergency Management Administration: No Comment Made or Final Review			10						
AD78		Federal Railroad Administration: Comment Made (not Final)			15						



# STATE OF TEXAS Records Retention Schedule

SLR 105  
Rev. 2021-07

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### Archival Codes (Field 10)

A/I – Transfer to State/University Archivist  
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1. Agency Code: 808			2. Agency Name: Texas Historical Commission								
3. Agency Item No.	4. Record Series Item No.	5. Record Series Title	6. Description	7. Ret. Code	8. Retention Period			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
AD79		Federal Railroad Administration: No Comment Made or Final Review			10						
AD80		Fish & Wildlife Service: Comment Made (not Final)	Section 106 Project Reviews of proposed actions for potential impacts to historic archeological sites, and other properties of historical significance.	CE	20						
AD81		Fish & Wildlife Service: No Comment Made or Final Review			10						
AD82		Forest Service, U.S.: Comment Made (not Final)			25						
AD83		Fish & Wildlife Service: No Comment Made or Final Review			10						
AD84		General Services Administration: Comment Made (not Final)			30				E		
AD85		General Services Administration: No Comment Made or Final Review			15						
AD86		General Services Administration: Plans/Maps/Drawings		AC	20			AC=Determine Inactive			
AD87		Geological Survey: Comment Made			15				E		



# STATE OF TEXAS Records Retention Schedule

SLR 105  
Rev. 2021-07

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					Years	Months	Days				
AD88		Geological Survey: No Comment Made or Final Review			10						
AD89		Governor, Office of the: Comment Made			15						
AD90		Governor, Office of the: No Comment Made or Final Review			10						
AD91		Highway Projects (Federal & State): Comment Made (not Final)	State=Texas Dept. Of Transportation (TxDOT) Federal=Federal Highway Administration		25						
AD92		Highway Projects (Federal & State): No Comment Made or Final Review	State=Texas Dept. Of Transportation (TxDOT) Federal=Federal Highway Administration		15						
AD93		HUD-Community Development Block Grant: One-Phase Construction Clearances	HUD=Housing & Urban Development		25				E		
AD94		HUD-Community Development Block Grant: Multi-Year Project Clearances	HUD=Housing & Urban Development	AC	30			AC=Determine Inactive	E		
AD95		HUD-Community Development Block Grant: No Comment Made or Final Review	HUD=Housing & Urban Development		10					RP-36 Box Type	



# STATE OF TEXAS Records Retention Schedule

SLR 105  
Rev. 2021-07

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					Years	Months	Days				
AD96		HUD-Community Development Block Grant: Plans/Maps/Drawings	HUD=Housing & Urban Development	AC	30			AC= Determine Inactive.	E		
AD97		HUD-Subdivisions: One-Phase Construction Clearances			15				E		
AD98		HUD-Subdivisions: Multi-phase Construction Clearances		AC	15			AC=Determine Inactive	E		
AD99		HUD-Subdivisions: No Comment Made or Final Review			10						
AD100		HUD-Urban Development Action Grant: Comment Made - Major Projects			15				E		
AD101		HUD-Urban Development Action Grant: No Comment Made or Final Review		AC	15			AC=Determine Inactive			
AD102		HUD-Urban Development Action Grant: Plans/Maps/Drawings		AC	10			AC=Determine Inactive	E		
AD103		HUD-Urban Development Action Grant: No Comment Made or Final Review			15			AC=Determine Inactive			



# STATE OF TEXAS Records Retention Schedule

SLR 105  
Rev. 2021-07

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					Years	Months	Days				
AD104		HUD (Section 202): Comment Made (not Final)			15						
AD105		HUD (Section 202): No Comment Made or Final Review			10						
AD106		International Boundary & Water Commission: Comment Made			30						
AD107		International Boundary & Water Commission: No Comment Made or Final Review			10						
AD108		International Indian Gaming Commission: Comment Made			15						
AD109		International Indian Gaming Commission: No Comment Made or Final Review			10						
AD110		Surface Transportation Board (Formerly Interstate Commerce Commission): Comment Made			25						
AD111		Surface Transportation Board (Formerly Interstate Commerce Commission): No Comment Made or Final Review			10						



# STATE OF TEXAS Records Retention Schedule

SLR 105  
Rev. 2021-07

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					Years	Months	Days				
AD112		Minerals Management Services: Comment Made			25						
AD113		Minerals Management Services: No Comment Made or Final Review			10						
AD114		National Aeronautic & Space Administration: Comment Made			15						
AD115		National Aeronautic & Space Administration: No Comment Made or Final Review			10						
AD116		National Endowment for the Arts: Comment Made			15						
AD117		National Endowment for the Arts: No Comment Made or Final Review			10						
AD118		National Endowment for the Humanities: Comment Made			15						
AD119		National Endowment for the Humanities: NO Comment Made or Final Review			10						
AD120		National Oceanic & Atmospheric Administration: Comment Made			20						



# STATE OF TEXAS Records Retention Schedule

SLR 105  
Rev. 2021-07

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					Years	Months	Days				
AD121		National Oceanic & Atmospheric Administration: No Comment Made of Final Review			10						
*AD122		National Park Service - Land/Park Management Plans	plans	AC	15			AC = project either completed or cancelled	E		
AD123		National Oceanic & Atmospheric Administration: Property rehabilitation or Acquisition			30				E		
AD124		NATIONAL PARK SERVICE- NO COMMENT MADE OR FINAL REVIEW	Section 106 Project Reviews of proposed actions for potential impacts to historic buildings, archeological sites, and other properties of historical significance.	CE	25						
AD125		Natural Resources Conservation Service: Comment Made - Major Projects (dams, etc.)		AC	25			AC=Determine Inactive.	E		
AD126		Natural Resources Conservation Service: Comment Made/CAT & Watershed Plans			25						
AD127		Natural Resources Conservation Service: No Comment Made or Final Review			10						



# STATE OF TEXAS Records Retention Schedule

SLR 105  
Rev. 2021-07

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					Years	Months	Days				
AD128		Office of Surface Mining & Reclaim/RRC: Comment Made - Major Projects/Mines		AC	30			AC=Determine Inactive	E		
AD129		No Comment Made or Final Review			10						
AD130		Postal Service, US: Comment Made - Major Projects		AC	25			AC=Determine Inactive			
AD131		Postal Service, US: No Comment Made or Final Review			10						
AD132		Postal Service, US: Comment Made - Small Projects		AC	25			AC= Determine Inactive			
*AD133		Postal Service, U.S. plans/maps/drawings	plans/maps/drawings		10						
AD134		River Authority: Comment Made			25						
AD135		River Authority: No Comment Made or Final Review			10						
AD136		Resolution Trust Corporation: No Comment Made or Final Review			10						
AD137		Rural Utilities Services: Comment Made			25						
AD138		Rural Utilities Services: No Comment Made or Final Review			10						



# STATE OF TEXAS Records Retention Schedule

SLR 105  
Rev. 2021-07

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					Years	Months	Days				
AD139		Small Business Administration: Comment Made			15						
AD140		Small Business Administration: No Comment Made or Final Review			10						
*AD141		Texas Parks & Wildlife Dept plans/maps/drawings	plans/maps/drawings		10						
AD142		Texas Parks & Wildlife Department: No Comment Made or Final Review			10						
*AD143		Federal Transit Authority plans/maps/drawings	plans/maps/drawings		10						
AD144		Federal Transit Authority (formerly Urban Mass Transit Authority): No Comment Made or Final Review			10						
AD145		Veterans Administration-Subd: Comment Made			25						
AD146		Veterans Administration-Subd: No Comment Made or Final Review			10						



# STATE OF TEXAS Records Retention Schedule

SLR 105  
Rev. 2021-07

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					Years	Months	Days				
AD147		Private Projects (Non-Federal): Comment/No Comment Made	Project Reviews that involve privately owned property, TxDOT permitted projects that consist of SAL's, or projects where the agency involved is a private entity (publicly funded).	CE	15						
AD148		Texas Historic Conservation Plan: Files - County		AC	10			AC=Determine Inactive.	E		
AD148A		Texas Historic Conservation Plan: Files - Printouts		AC	10			AC=Determine Inactive	E		
AD148B		Texas Historic Conservation Plan: Files - Administrative		AC	10			AC=Determine Inactive.	E		
AD148C		Texas Historic Conservation Plan: Files - Shipwrecks		AC	10			AC=Determine Inactive.	E		
AD149		Advisory Commission on Intergovernmental Affairs, Texas: Comment Made			15						
AD150		Advisory Commission on Intergovernmental Affairs, Texas: No Comment Made or Final Review			10						
AD151		Adjutant General's Department: Comment Made			15						



# STATE OF TEXAS Records Retention Schedule

SLR 105  
Rev. 2021-07

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					Years	Months	Days				
AD152		Adjutant General's Department: No Comment Made or Final Review			10						
AD153		Agriculture, Dept. Of (USDARD), FSA, RDA): Comment Made			25						
AD154		Agriculture, Dept. Of (USDARD), FSA, RDA): No Comment Made or Final Review			10						
AD158		Architect of the Capitol, Texas: Comment Made			15						
AD159		Architect of the Capitol, Texas: No Comment Made or Final Review			10						
AD160		Attorney General, Office of Texas: Comment Made			15						
AD161		Attorney General, Office of Texas: No Comment Made or Final Review			10						
AD162		Cities, Texas: Comment Made			25						
AD163		Cities, Texas: No Comment Made or Final Review			10						



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SLR 105  
Rev. 2021-07

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					Years	Months	Days				
AD164		Coastal & Marine Council, Texas: Comment Made			25						
AD165		Coastal & Marine Council, Texas: No Comment Made or Final Review			10						
AD166		Counties, Texas: Comment Made			25						
AD167		Counties, Texas: NO Comment Made or Final Review			10						
AD168		Economic Development, Dept. Of (State): Comment Made			25						
AD169		Economic Development, Dept. Of (State): No Comment Made or Final Review			10						
AD170		Energy & Natural Resources, Advisory Council of Texas: Comment Made			25						
AD171		Energy & Natural Resources, Advisory Council of Texas: No Comment Made or Final Review			10						
AD172		Flood Control Districts, Texas: Comment Made			25						



# STATE OF TEXAS Records Retention Schedule

SLR 105  
Rev. 2021-07

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					Years	Months	Days				
AD173		Flood Control Districts, Texas: No Comment Made or Final Review			10						
AD174		General Land Office, TX: Comment Made			25						
AD175		General Land Office, TX: No Comment Made or Final Review			10						
AD176		Gulf Coastal International Waterway Advisory Committee, Texas: Comment Made			25						
AD177		Gulf Coastal International Waterway Advisory Committee, Texas: No Comment Made or Final Review			10						
AD178		Texas Department of Rural Affairs (formerly ORCA - TDHCA): Comment Made			25						
AD179		Texas Department of Rural Affairs (formerly ORCA - TDHCA): No Comment Made or Final Review			10						
AD180		Independent School Districts, Texas: Comment Made			25						



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SLR 105  
Rev. 2021-07

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					Years	Months	Days				
AD181		Independent School Districts, Texas: No Comment Made or Final Review			10						
AD182		Jail Standards, Texas Commission On: Comment Made			25						
AD183		Jail Standards, Texas Commission On: No Comment Made or Final Review			10						
AD184		Mental Health & Mental Retardation: Comment Made			25						
AD185		Mental Health & Mental Retardation: No Comment Made or Final Review			10						
AD186		Texas Commission on Environmental Quality (formerly TX Nat. Res. Council): Comment Made			25						
AD187		Texas Commission on Environmental Quality (formerly TX Nat. Res. Council): No Comment Made or Final Review			10						
AD189		Public Utilities Commission, Texas: Comment Made			25						



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SLR 105  
Rev. 2021-07

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					Years	Months	Days				
AD190		Public Utilities Commission, Texas: No Comment Made or Final Review			10						
AD191		Purchasing & General Services, Texas: Comment Made			25						
AD192		Purchasing & General Services, Texas: No Comment Made or Final Review			10						
AD193		State, Department of: Comment Made			25						
AD194		State, Department of: No Comment Made or Final Review			10						
AD195		Tourist Development Agency, Texas: Comment Made			15						
AD196		Tourist Development Agency, Texas: No Comment Made or Final Review			10						
AD197		Waste Disposal Authorities, Texas: Comment Made			15						
AD198		Waste Disposal Authorities, Texas: No Comment Made or Final Review			10						



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SLR 105  
Rev. 2021-07

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					Years	Months	Days				
AD199		Water Commission, Texas: Comment Made			15						
AD200		Water Commission, Texas: No Comment Made or Final Review			10						
AD201		Water Development Board, Texas: Comment Made			25						
AD202		Water Development Board, Texas: No Comment Made or Final Review			10						
AD203		Water Supply Corporation, Texas: Comment Made			25						
AD204		Water Supply Corporation, Texas: No Comment Made or Final Review			10						
AD205		Universities, Texas: Comment Made			25						
AD206		Universities, Texas: No Comment Made or Final Review			10						
AD207		Antiquities Permits Issued, Completed, Closed or Cancelled		AC	60			AC=Permit Completed	E		
AD210		State Archeological Landmarks (general info.)		US							



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SLR 105  
Rev. 2021-07

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					Years	Months	Days				
AD211		State Archeological Landmarks Status Denied/Removed		AC	20			AC=project settled either being denied or removed.	A	Remain at agency until they cease to have frequent admin/research use. Then transfer to the SLA.	
AD212		Designated State Archeological Landmarks: Archeological/Architectural Sites		AV					A	Remain at agency until cease to have frequent admin/research use, then transfer to TSLAC.	
AD213A		Archeological Survey Site Forms & Reports - Final		AV					A	The archival requirement of this series if fulfilled by sending copies of the reports to the Pub Depository Program. TSLAC.	
AD213B		Archeological Survey Sites Forms & Reports - Final		PM					A	Master copy of microfilm at SRC; bound hardcopy in agency library & no additional film after 1981. Records will be transferred to TSLAC if the agency decides to no longer retain them permanently.	
AD213C		Archeological Survey Sites Forms & Reports - Final		AC	50			AC=Final reports have been bound into book binders (including site forms).	A	Hardcopy of Final Reports	
AD214		Platoro Collection Files		PM					A	Master copy of microfilm at SRC; bound hardcopy in agency library & no additional film after 1981.	



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SLR 105  
Rev. 2021-07

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					Years	Months	Days				
AD215		Special Project Files (Includes LaSalle Project)		AV					A	Remain at agency until they cease to have frequent admin/research use. Then transfer to the SLA. The survey data files are available only in electronic format.	
AD216	1.1.057	Transitory info (e-mail, notes, flyers, etc.)	Records of temporary usefulness that are not an integral part of a records series of an agency and are not essential to the fulfillment of statutory obligations or to the documentation of agency functions. Some examples of transitory information, which can be in any medium (voice mail, fax, email, hard copy, etc.) are routine messages; telephone message notifications; internal meeting notices; routing slips; incoming letters or memoranda of transmittal that add nothing of substance to enclosures; and similar routine information used for communication, but not for the documentation, of a specific agency transaction.	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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SLR 105  
Rev. 2021-07

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					Years	Months	Days				
AD217	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).
AD218	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	ARCHIVES NOTE: Only the calendars, appointment, and itinerary records of elected officials, executive staff, board or commission members, division directors, and program heads require archival review. Contact the State Archives when these records have met their retention periods. 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.	
*AD219		Water Utilities/Public Service Board - plans/maps/drawings	plans/maps/drawings		12						
AD220		CPS Energy			10						



# STATE OF TEXAS Records Retention Schedule

SLR 105  
Rev. 2021-07

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AD221	1.1.006	Complaint Records	Complaints received by an agency from the public concerning the agency & records pertaining to the resolution of the complaint.	AC	2			AC= Date of receipt, action taken, or final disposition of the complaint, whichever comes last.		CAUTION: If a complaint becomes the subject of litigation, it must be included in & is subject to the minimum retention period of item number 1.1.048.	
AD222	1.1.020	Open Records Requests - Approved/Denied	Includes all correspondence and documentation relating to requests for records that are furnished to the public under the Public Information Act (Chapter 552, Government Code). Also includes withdrawn requests.	AC	2			AC = Date request fulfilled or date of notification that records are exempt.		"Includes RSIN 1.1.021"	
AD223	1.1.026	Texas Register Submissions	Copies of all proposed, withdrawn, emergency, and adopted rules; open meetings notices; or any other documents required by law to be submitted to the Texas Register.	AC	1			AC=Date of publication in the "Texas Register."			
AD224	1.1.061	Meeting Notes of the Archeology Committee of the THC & the Antiquities Advisory Board (AAB)	Includes notes taken during open meetings from which written minutes are prepared.	AC			90	AC=Approval of the formal minutes by each respective entity's governing body, i.e. The THC Archeology Committee or the AAB.			
AD225		Applications for Access to Restricted Cultural Resource Information	Application forms requesting access to the restricted cultural resource information on agency website and database	AV	4					These will remain in the agency until they cease to have frequent administrative and research use. Then they will be transferred to the Library and Archives Commission	

ADMINISTRATION DEPARTMENT (AM)



# STATE OF TEXAS Records Retention Schedule

SLR 105  
Rev. 2021-07

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AM1	1.1.006	Complaint Files/Executive		AC	2			AC= Date of receipt, action taken, or final disposition of the complaint, whichever comes last			
AM2	1.1.007	Correspondence Administrative	Incoming/outgoing & internal correspondence pertaining to formulation, planning, implementation, interpretation, modification, or redefinition of the programs, services, or projects of the Administration Division (Executive Office) of the THC and the administrative regulations, policies, and procedures that govern them.		4				R	ARCHIVES NOTE: Only the administrative correspondence of executive staff, board or commission members, division directors and program heads require archival review. Contact the State Archives when these records have met their retention periods. IMPORTANT: Does not include litigations found in AM22 CAUTION: Records series item no. 1.1.007 and item number 1.1.008 should be used only for correspondence not included in or directly related to another records series on the THC's approved schedule. For example, a memo that documents an appropriations request must be retained for minimum retention period prescribed by item no. 1.1.004; a letter concerning audit for that prescribed by item number 1.1.002, etc. SEE ALSO items no. 1.1.011.	



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Rev. 2021-07

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AM3	1.1.008	Correspondence - General	Non-administrative incoming/outgoing & internal correspondence, in any media, pertaining to or arising from routine operations of the policies, programs, services, or projects of the Administrative Division (Executive Office) of the THC.		2					CAUTION: Records series item no. 1.1.007 and item number 1.1.008 should be used only for correspondence not included in or directly related to another records series on the THC's approved schedule. For example a memo that documents an appropriations request must be retained for minimum retention period prescribed by item no. 1.1.004; a letter concerning an audit for that prescribed by item number 1.1.002, etc. SEE ALSO items no. 1.1.010	



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Rev. 2021-07

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AM4a	1.1.058	THC Meeting Agenda & Minutes	Official agendas & minutes of the THC's boards, committees, commissions, & councils that conduct open meetings as required by Gov. Code.	PM					A	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. 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 Copies of THC's commission & committee's meeting agendas & minutes are sent to TSLAC, originals are retained by the THC.	



# STATE OF TEXAS Records Retention Schedule

SLR 105  
Rev. 2021-07

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					Years	Months	Days				
AM4b	1.1.061	Meetings Notes	Of the commission of the THC and the Admin/OPEC Committee of the THC -- includes notes taken during opening meetings from which written minutes are prepared.	AC			90	AC=Approval of the formal minutes by each respective entity's governing body, i.e., the THC or the Admin/OPEC Committee.			
AM4c	1.1.059	Meetings, Certified Agenda or audio recordings of closed meetings		AC	2			AC=The date of the meeting or completion of pending action involving the meeting whichever is later.		See Caution comment at item number 1.1.058.	TGC 551.104(a)
AM4d	1.1.060	Audio or Videotapes of Open Meetings		AC			90	AC= Official approval of written minutes of the meeting by the governing body of an agency		Caution: Minutes of state agencies are permanent records. Audio and videotapes are not permanent media. State agencies may not retain audio or videotapes of the meetings of governing bodies in lieu of written minutes. The proceedings of all meetings of state boards, committees, commissions and councils must be reduced to writing.	
AM5	1.1.062	THC Meetings Supporting Documentation			2				A	See caution comment at RSIN 1.1.058	
AM6	1.1.063	Staff Meetings Minutes/Notes	Minutes of internal agency staff meetings during which formal minutes are taken.		2						



# STATE OF TEXAS Records Retention Schedule

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Rev. 2021-07

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AM7	1.1.023	Organizational 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	<b>ARCHIVES NOTE:</b> 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.	
AM9	1.1	Commission Members and Executive - Directors		AV						Bios/Vitae, Applications for appointments by Governors	
AM10	1.1.020	Open Records Request – Approved/Denied	Includes all correspondence and documentation relating to requests for records that are furnished to the public under the Public Information Act (Chapter 552, Government Code). Also includes withdrawn requests.	AC	2			AC = Date request fulfilled or date of notification that records are exempt.		“Includes RSIN 1.1.021”	
AM11	1.1.065	Reports and Studies (Non-Fiscal) – Raw Data		AC	3			AC = 2 years from date of collection.			



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SLR 105  
Rev. 2021-07

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AM12a	1.1.070	Agency Rules, Policies and Procedures - Final	Manuals, Internal publications or statements which define organizations" policies, procedures, etc. Includes personnel manual and accounting manual.	AC	3			AC= Until superseded or termination of program, rules, policies or procedures.	R	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.	
AM13	1.1.040	Speeches	Notes or text of speeches 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.	
AM15		Records of THC Buildings	Includes deeds & a report from GLO describing THC real properties.	PM						See files marked "Property Deeds" & "Real Property."	
AM16		Executive Committee of the THC	Copies of any handouts or general info produced for or sent to the Exec. Comte.	AV	1						



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Rev. 2021-07

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AM20	1.1.057	Transitory Info (some email, notes, flyers, etc.)	Records of temporary usefulness that are not an integral part of a records series of an agency and are not essential to the fulfillment of statutory obligations or to the documentation of agency functions. Some examples of transitory information, which can be in any medium (voice mail, fax, email, hard copy, etc.) are routine messages; telephone message notifications; internal meeting notices; routing slips; incoming letters or memoranda of transmittal that add nothing of substance to enclosures; and similar routine information used for communication, but not for the documentation, of a specific agency transaction.	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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AM21	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	ARCHIVES NOTE: Only the calendars, appointment, and itinerary records of elected officials, executive staff, board or commission members, division directors, and program heads require archival review. Contact the State Archives when these records have met their retention periods. 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.	
AM22A	1.1.048	Litigation		AC	1			AC = As applicable, decision not to file a lawsuit or decision that a lawsuit will not be filed against THC; dismissal of a lawsuit.	R	Cases that set legal precedents or exhibit historical value will be evaluated by the Archives and Information Services Division of the Texas State Library and Archives Commission.	



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AM22B	1.1.014	Legal Opinions and advice	From agency legal counsel or the Attorney General, including any request eliciting the opinions	AV					R	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. Caution: Does not include legal opinions or advice rendered on a matter in litigation or with regard to pending litigation. See: item number See RSIN 1.1.048 and 1.1.020.	
AM23	1.1.002	Audits	Audit reviews performed on the agency by internal or external auditors	AC	7			AC=Publication or release of final audit findings.		Record copy of any audit performed by State Auditor's office is retained permanently by that agency. THC keeps all audits electronically.	
AM24	1.1.038	Customers Surveys	Evaluation of the THC by customers.	AC	2			AC=Final disposition of summary report.		SEE item number 1.1.067 for summary reports compiled from customer surveys.	



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Rev. 2021-07

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AM25	1.1.067	Reports & Studies (Non-Fiscal)	Includes Surveys of Employee Excellence (SEE) -- formerly known as Surveys of Organizational Excellence (SOE) -- in which THC is evaluated by its own staff. Also HRIS, EEO reports & supporting documentation		3				R	ARCHIVES NOTE: Reports are archival when they deal with significant aspects of the agency's programs. For agencies that have had an archival appraisal, separate this records series by each type of archival coding, A, R, or E. S Archival review required before disposal.	
AM26	1.1.026	Texas Register submissions	Copies of all proposed, withdrawn, emergency, and adopted rules; open meetings notices; or any other documents required by law to be submitted to the Texas Register.	AC	1			AC=Date of publication on the Texas Register website.			
AM27	1.2.001	Destruction Authorizations		FE	3					Agency level documents authorizing final disposition of records under THC's certified records retention schedule.	
AM28	1.2.005	Records Retentions Schedule (SLR 105)		US						Agency copy. Formerly RMD 105. Includes documentation of certification & approval -- forms SLR 105C (formerly RMD 105C) &/or other forms designated by the State Records Administrator. Original kept by SLRM of TSLAC.	



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Rev. 2021-07

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AM29	1.2.006	Records Transmittal Forms	Agency copy (includes RMD 101, Tx-R-5, 306-588-1, and Agency Storage Forms). Indicate records transferred to storage or a transfer of legal custody.	AC	2			AC=Date of authorization for destruction, permanent transfer from storage, or transfer to the Archives & Information Service Division of TSLAC by the THC records management officer.			
AM31	1.2.010	Records Disposition Log			10					Logs or similar records listing records destroyed or transferred to Archives & Information Service Division of TSLAC by showing records series title, dates of records, and date destroyed or transferred.	
AM32	1.2.011	RMD 106 Forms	Agency copy of completed Record Center Storage Approval forms	US						Paper & Electronic files. May need to add other 1.2 record series for records retention mgmt. Forms.	
AM33	1.2.012	Records Inventory Worksheets		US							
AM34	1.2.013	Records Control Locator Aids	Includes indexes, card files, shelf lists, registers, guides, etc.	AC				AC=When control aid is updated, revised, or no longer needed.			



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					Years	Months	Days				
AM35	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 later.		Moved on THC RRS from Accounting to Admin on July 6, 2011. Former Agency Item No. AC12.	29 CFR 1602.31.
AM36	3.1.012	Employment Opportunity Announcements	Includes job postings.		2					Moved on THC RRS from Accounting to Admin on July 6, 2011. Former Agency Item No. AC16.	29 CFR 1602.31.
AM37	3.1.014	Employment Selections	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; polygraph examination results; and all other records that document the selection process, except for those noted in Remark	AC	2			AC= Date of the making of the record or the personnel action involved, whichever occurs later.		Moved on THC RRS from Accounting to Admin on July 6, 2011. Former Agency Item No. AC17. CAUTION: Does not include criminal history checks; see RSIN 3.1.026. Does not include drug screening test results; see RSIN 3.1.040a/b/c. Does not include pre-employment skills tests; see RSIN 3.3.027 and 3.3.028.	29 CFR 1602.31.
AM38	3.1.018	Grievance Records		AC	3					Moved on THC RRS from Accounting to Admin on July 6, 2011. Former Agency Item No. AC19.	



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Rev. 2021-07

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AM39	5.4.001	Workers Compensation Reports	Accident or occupational disease reports (by supervisors and employees) and other associated reports required to be submitted to the State Office of Risk Management (SORM) or its predecessors or maintained internally on accident frequency.	CE	5					Moved on THC RRS from Accounting to Admin on July 6, 2011. Former Agency Item No. AC21.	29 CFR 1904.33; 28 TAC 120.1(c).
AM40	3.3	Personnel Files	Includes employee insurance, performance appraisals, security access, criminal background checks & employment applications-hired. Temporary employee, contracted employee and internship files. Training and educational achievement records.	AC	5					Moved on THC RRS from Accounting to Admin on July 6, 2011. Former Agency Item No. AC22. Documents that serve as payroll deduction authorizations must be maintained for the retention period prescribed for item number 3.2.001. Moved on THC RRS from Accounting to Admin on July 6, 2011. Former Agency Item No. AC25.	29 CFR 1602.32(c), 26 CFR 31.6001-1(e)(2), and 8 CFR 274a.2(b)(2)(i)(A) & (c)(2)
AM41	3.3.011	Current & Former Employee Verification & Benefits Records	Minimum info needed to verify employment.	AC	75					Moved on THC RRS from Accounting to Admin on July 6, 2011. Former Agency Item No. AC23.	
AM45	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					Moved on THC RRS from Accounting to Admin on July 6, 2011. Former Agency Item No. AC29.	



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AM46a	3.2.009	State Deferred Compensation	Records documenting the amount of pension or deferred compensation earned by individual employees.	AC	5			29 CFR 1602.31 [State Agencies].		Moved on THC RRS from Accounting to Admin on July 6, 2011. Former Agency Item No. AC30.	
AM47	3.3.015	Positions/Job Classification Review File	Records relating to review and monitoring of job classifications within an agency.	US	3					Moved on THC RRS from Accounting to Admin on July 6, 2011. Former Agency Item No. AC35.	
AM48	3.3.022	Texas Workforce Commission (TWC) Reports	Reports to the agency from TWC or its predecessor pertaining to employees.		3					Moved on THC RRS from Accounting to Admin on July 6, 2011. Former Agency Item No. AC36.	
AM49	3.4.002	Leave Status Report	Includes time sheets, overtime authorizations, time off/sick leave requests. Cumulative report is issued each pay cycle & provides employee leave status info for each position.	FE	3					*=All audit requirements will be met. Moved on THC RRS from Accounting (Staff Services Division) to Admin (Human Resources Department) on July 6, 2011. Former Agency Item No. AC37.	
AM50	5.4.013	Continuity of Operations Plans (COOP)	Includes Business Continuity Plan and Risk Management Manual. 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.	
AM51	5.1.001	Contracts & Leases	Includes Interagency MOU's, MOA's, etc. and correspondence relating to these items.	AC	7			AC=Expiration or termination of the instrument according to its terms.		SB20 (84th Leg.)	



# STATE OF TEXAS Records Retention Schedule

SLR 105  
Rev. 2021-07

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AM52		Awards & Honors — Texas Treasures Business Awards and First Lady’s Texas Treasures Awards		PM							
AM53	1.1.074	Sunset Review Report & Documentation.	Sunset Review Report, agency self-study, and other correspondence and supporting documentation related to the Sunset review process for state agencies.	AC	3			AC=After the subsequent Sunset Review.	R	Convenience copies kept by THC Agency Planner both in paper & electronic media.	
AM54	3.1.011	Employee Benefits	Agency copies of information relating to the selection by employees of life, disability, health, vision, dental, disability, and other types of insurance or benefits offered by the State of Texas to its employees.	AC	4			AC=Until superseded or termination of employment			
AM55	3.1.023	Position/Job Description	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)
AM56	3.1.029	Employment Eligibility (INS I-9)		AC	1			AC= 3 years after date of hire or 1 year after termination of employment, whichever is later.		CAUTION: Federal regulation requires that INS I-9 forms be retained for 3 years from the date of hire or 1 year after separation of the employee, whichever later.	8 CFR 274a.2(b)(2)(i)(A) and (c)(2)
<b>DIVISION OF ARCHITECTURE (AT)</b>											
AT1	1.1	Division of Architecture Biennial Budget Division			6						



# STATE OF TEXAS Records Retention Schedule

SLR 105  
Rev. 2021-07

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AT2A	1.1.007	Correspondence — Administrative	Incoming/outgoing & internal correspondence pertaining to formulation, planning, implementation, interpretation, modification, or redefinition of the programs, services, or projects of the Division of Architecture of the THC and the administrative regulations, policies, and procedures that govern them.		4				R	CAUTION: Records series item no. 1.1.007 and item number 1. 1.008 should be used only for correspondence not include in or directly related to another records series on the THC's approved schedule. For example, a memo that documents an appropriations request must be retained for minimum retention period prescribed by item no. 1.1.004; concerning an audit for that prescribed by item number 1.1.002, etc. SEE ALSO items no. 1.1.011. ARCHIVES NOTE: Only administrative correspondence of executive staff, board or commission members, division directors and program heads require archival review Contact the State Archives when these records have met their retention periods.	



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SLR 105  
Rev. 2021-07

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AT2B	1.1.008	Correspondence-General	Non-administrative incoming/outgoing and internal correspondence, in any media, pertaining to or arising from the routine operations of the polices, programs, services or projects of Division of Architecture of the THC.		2					CAUTION: This records series item no. 1.1.007 and item number 1.1.008 should be used only for correspondence that is not included in or directly related to another records series in this 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; a letter concerning an audit for that prescribed by item number 1.1.002, etc. SEE ALSO item number 1.1.011.	



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					Years	Months	Days				
AT3	1.1.058	Meeting Agenda and Minutes of Trust Fund Associated Boards	Official agenda and minutes of state boards, committees, commissions & councils	PM					A	Agency retains PM Copy. Archival requirements send to State archives. Archival requirements are met by sending a copy to the state archives. 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.	
AT4	1.1.062	Meetings-Supporting Documentation of Trust Fund Associated Boards			2				A	See caution comment RSIN 1.1.058	
AT6	1.1.069	Reports - Activity. Quarterly Reports.			2						
AT7	1.1.059	Meetings, Certified Agendas of Closed meetings.		AC	2			AC=The date of the meeting of completion of pending action involving the meeting, whichever is later.			Texas Government Code, §551.104(a) Tape Recordings



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AT8A	1.1.060	Meetings – Open	Audio or Videotapes of Open Meetings of the THC Architecture Committee	AC			90	AC = Official approval of written minutes of meetings by the THC Architecture Committee.			
AT8B	1.1.061	Meetings – Notes	Notes Taken during Open Meetings of the THC Architecture Committee	AC			90	AC = approval of the formal minutes by the THC Architecture Committee.			
AT9	2.1.007	Computer Software Programs	Agency-developed automated software applications, operating system files, and associated processing files, including job control language, programs, applications, scripts, 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.
AT10	5.2.003	Agency Building Plans and Specifications	Includes architectural and engineering drawings, profiles, and blueprints of planning, design, construction, conversion, or modernization of state owed facilities, structures, infrastructure, and systems.	LA					R	Records remain at agency, until no longer using bldg. - then transfer to SLA if property still owned by state.	
AT11	5.2.010	Equipment Manuals		LA							
AT12	5.2.011	Warranties		AC	1			AC= Expiration of Warranty.			
AT13		Federal Tax Act Files &/or Plans/Maps/Drawings (Certified and Rejected)		AC	50			AC = The THC and/or National Park Service of completed review and have approved/rejected the project.	A		



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Rev. 2021-07

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					Years	Months	Days				
AT13A		Federal Tax Act Files &/or Plans/Maps/Drawings (Inactive, Dead, Potential & Pending)		AC	30			AC= The THC and/or/ National Park Service have completed review and have approved or rejected the project	A	Inactivity could be due to a THC staff, NPS or applicant decision	
AT13B		State Tax Act Files and/or Plans/Maps/Drawings (Certified and Rejected)		AC	50			AC=The THC has completed review and has approved or rejecte4d the project.	A		
AT13C		State Tax Act Files and/or Plans/Maps/Drawings (Inactive, Dead, Potential & Pending)		AC	15			AC=project file/plans/maps/drawings have been determined as inactive		Inactivity could be due to a THC staff, NPS or applicant decision	
AT16		Inactive Pending State Grant Files	TX Historic Preservation Grant Program & Federal Grant Files -- Historic Preservation Fund Grants-in-Aid -- Plans/Maps/Drawings		50						
AT17		Texas Preservation Trust Fund Program Development Documentation		AV					E		
AT17A		Texas Preservation Trust Fund Program: Administrative Files		AC	30			AC=Administrative files can be closed at end of each grant cycle. Grant cycles may vary depending on program funding.	R		



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AT20		County Courthouse Reviews/Files	Plans/maps/drawings, project manuals, specifications & photos.	AV	50			AC = Administrative value and research used in agency.	A	These records will remain at the THC until they ceased to have frequent administrative and research use. They will then be transferred to TSLAC.	
AT20A		County Courthouse Reviews/Files		AV					A	these records over and made at the agency its of AC to have frequent administrative and research use. They will then be transferred to the TSLAC.	
AT20B		County Courthouse Files	Plans/Maps/Drawing	AV					A	These records are remain at the agency until they ceased to have frequent administrative and research use. They will then be transferred to the SLA.	
AT21A		The State Grant Files – Texas Historic Preservation Grant Program and/or Plans/Maps/Drawings		AC	45			(Program ended in 2004) AC = Date respective grant project completed/completion report approved by agency staff.	A		
AT21B		State Grant Files – Texas Historic Preservation Grant Program		PM						(Program no longer exists as of 2004)	



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AT22A	4.7.008	Federal Grant Files – Historic Preservation Funds Grant-in-Aid		AC	45			AC= Satisfaction of all Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments (the Common Rule).	A	(Program no longer exists as of 2004)	
AT22B	4.7.008	Federal Grant Files - Historic Preservation		PM						(Program no longer exists as of 2004)	
AT23		Architectural Awards Files			10				E		
AT24		Endangered Historic Properties Needs Assessment Files		AV					A	These records will remain the agency until they cease to have frequent administrative and research use. They will then be transferred to TSLAC.	
AT25A		Texas Preservation Trust Fund Grant Program – Funded Project Files		AC	30			AC = Conditions of grant for filled or expiration, termination of grant process.	A		
AT25B		Texas Preservation Trust Fund Grant Program - Plans/Maps/Drawings (funded)		AC	30			AC = Conditions of grant for filled or expiration, termination of grant process.	A		
AT25C		Texas Preservation Trust Fund Grant Program - Funded Project Completion Reports		AV					A	Transfer to State Library & Archives.	



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AT26		Recorded Texas Historic Landmark Reviews	Plans/map/drawings, project manuals, specifications, photos and oversized review documents.	AC	45			AC=The completion of the THC required review and the completion of the actual project construction	A		
AT27		National Register Of Historic Places Reviews	Plans/map/drawings, project manuals, specifications, photos and oversized review documents.	AC	45			AC=The completion of the THC required review and the completion of the actual project construction	A		
AT29	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	ARCHIVES NOTE: Only the calendars, appointment, and itinerary records of elected officials, executive staff, board or commission members, division directors, and program heads require archival review. Contact the State Archives when these records have met their retention periods. 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.	



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AT30	1.1.057	Transitory Info (email, notes, flyers)	Records of temporary usefulness that are not an integral part of a records series of an agency and are not essential to the fulfillment of statutory obligations or to the documentation of agency functions. Some examples of transitory information, which can be in any medium (voice mail, fax, email, hard copy, etc.) are routine messages; telephone message notifications; internal meeting notices; routing slips; incoming letters or memoranda of transmittal that add nothing of substance to enclosures; and similar routine information used for communication, but not for the documentation, of a specific agency transaction.	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).	
AT31	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).
AT32		State Archaeology Landmark Files	Includes permit applications, permits, general correspondence, some photos and drawings.	AC	50			AC=Date completion report approved by agency staff.	A		



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AT33		Unfunded Grant Files	Included unfunded, Texas Historical Preservation Grants, Federal grant Files, Historical Preservation Fund Grants-in-Aid & Texas Preservation Trust Fund. Includes Plans/Maps/Drawings/Docs/Photos		2						
AT34A		Texas Historic Courthouse Preservation Program	Includes docs/photos/master plans/completion reports/specifications.		50				A	Transfer to State Library & Archives.	
AT34B		Texas Historic Courthouse Preservation Program Drawings			50				A	Transfer to State Library & Archives.	
AT35		Federal 106 Reviews	Plans/maps/drawings, project manuals, specifications, photos and oversize review documents.	AC	25			AC=Date review is complete.	R		
AT36		Easements/Covenant/Deed Reviews	Plans/map/drawings, project manuals, specifications, and review files.	AC	50			AC=Date easement or covenant review is complete.	A		
AT37		Texas Antiquities Code Review	Plans/map/drawings, project manuals, specifications and oversized review documents.	AC	45			AC=After Closed.	A		
AT38		Texas Courthouse Stewardship	Program files, drawings and workshop materials.	AC	50			AC=After Closed	A		
AT39	1.1.006	Complaint Records	Received by THC's Division of Architecture from the public concerning the agency & records pertaining to the of the complaint.	AC	2			AC= Date of receipt, action taken, or final disposition of the complaint, whichever comes last		CAUTION: If 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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AT40	1.1.020	Open Records Request – Approved/Denied	Includes all correspondence and documentation relating to requests for records that are furnished to the public under the Public Information Act (Chapter 552, Government Code). Also includes withdrawn requests.	AC	2			AC = Date request fulfilled or date of notification that records are exempt.		“Includes RSIN 1.1.021”	
AT41		Historic American Buildings Survey (HABS)	Photos/drawings/copies of historic drawings or as-built drawings/CDs/written histories/maps.	AC	50			AC=Administrative value and usage in agency.	A	These records will remain at the THC until they cease to have frequent administrative use.	
<b>COMMUNITY HERITAGE DEVELOPMENT DIVISION (CH)</b>											
CH1	1.1.004	Biennial Budget Requests (CHD supporting documentation only)		AC	6			AC=September 1 of odd-numbered calendar years.			
CH2	1.1.006	Complaint and Feedback Records	Complaints and other unsolicited feedback received by an agency from the public concerning the agency and records pertaining to the resolution of complaints.	AC	2			AC= Date of receipt, action taken, or final disposition of the complaint, whichever comes last		CAUTION: If a complaint becomes the subject of litigation, it must be included & is subject to the minimum retention period of item number 1.1.048.	
CH3A	1.1.008	General Main Street Information	Memo and letters relating to routine correspondence, general inquiries, & requests for materials		2					CAUTION: The record series and item number 1.1.008 should only be used for correspondence that is not included in or directly related to another records series on the agency's approved schedule.	



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CH3B	1.1.008	Correspondence — General	Non-administrative incoming/outgoing & internal correspondence, in any media, pertaining to or arising from routine operations of the policies, programs, services, or projects of the Community Heritage Development Division of the THC.		2					CAUTION: Records series item no. 1.1.007 and item number 1.1.008 should be used only for correspondence not included in or directly related to another records series on the THC's approved schedule. For example, a memo that documents an appropriations request must be retained for minimum retention period prescribed by item no. 1.1.004; a letter concerning an audit for that prescribed by item number 1.1.002, etc. SEE ALSO items no. 11.010.period prescribed by item no. 1.1.004; a letter concerning an audit for that prescribed by item number 1.1.002, etc. SEE ALSO items no. 1.1.010	



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CH3C	1.1.007	Correspondence — Administrative	incoming/outgoing & internal correspondence pertaining to formulation, planning, implementation, interpretation, modification, or redefinition of the programs, services, or projects of the Community Heritage Development Division of the THC and the administrative regulations, policies, and procedures that govern them.		4				R	CAUTION: Records series item no. 1.1.007 and item number 1.1.008 should be used only for correspondence not included in or directly related to another records series on the THC's approved schedule. For example, a memo that documents an appropriations request must be retained for minimum retention period prescribed by item no. 1.1.004; a letter concerning an audit for that prescribed by item number 1.1.002, etc. SEE ALSO items no. 1.1.011. ARCHIVES NOTE: Only administrative correspondence - of executive staff, board or commission members, division directors and program heads require archival review Contact the State Archives when these records have met their retention periods.	
CH4	1.1.010	Directives	Any document that officially initiates, rescinds, or amends general office procedures.	US	1					Any document that officially initiates, rescinds or amends general office procedures.	
CH5	1.1.062	Main Street Interagency Council	Supporting documentation		2				A	See caution comment RSIN 1.1.058	



# STATE OF TEXAS Records Retention Schedule

SLR 105  
Rev. 2021-07

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A/I – Transfer to State/University Archivist  
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CH5A	1.1.057	Transitory Info	Records of temporary usefulness that are not an integral part of a records series of an agency and are not essential to the fulfillment of statutory obligations or to the documentation of agency functions. Some examples of transitory information, which can be in any medium (voice mail, fax, email, hard copy, etc.) are routine messages; telephone message notifications; internal meeting notices; routing slips; incoming letters or memoranda of transmittal that add nothing of substance to enclosures; and similar routine information used for communication, but not for the documentation, of a specific agency transaction.	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).	
CH6C	1.1.060	Open Meeting Audio or Videotapes	Audio or Videotapes of open meetings of state boards, commissions, committees & councils	AC			90	AC = Official approval of the meeting by the governing body of an agency.			
CH6D	1.1.061	Open Meeting Notes	Notes taken during open meetings from which written minutes are prepared.	AC			90	AC = Official approval of minutes of the meeting by the governing body of an agency.			



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Rev. 2021-07

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CH7A	1.1.043	Training materials - Paper medium, audio, video, or digital		US	1				R	CAUTION NOTE: Does not include hazardous material training records. See RSIN 5.4.007	
CH8	1.2.003	Forms - History File	Master versions of all forms used internally and externally by the agency., including subsequent revisions to an agency form or any associated design or design modification requests.	AC	2			AC=Until superseded or discontinuance of use of form			
CH10A	5.2.002	Building Construction - Project Files (Christianson-Leberman Complex)		PM					R	If the end of its retention it is still state property, transfer to TSLAC. ARCHIVES NOTE: Archival review designation is for state-owned buildings only.	



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Rev. 2021-07

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CH10B	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	ARCHIVES NOTE: Only the calendars, appointment, and itinerary records of elected officials, executive staff, board or commission members, division directors, and program heads require archival review. Contact the State Archives when these records have met their retention periods. 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.	
CH10C	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).
CH11A		Heritage Tourism/Certified Local Government	Information Files (includes minutes submitted from each CLG's preservation board, local radio commission).	AC	3			AC=Purpose of record has been fulfilled.			



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CH11B		Heritage Tourism Program Applications (active/inactive).		AC	20			AC=Purpose of record has been fulfilled.			
CH11C		Texas Treasures Business Award files		AC	20			AC=Purpose of record has been fulfilled.	R		
CH12		Main Street City Files. Active/inactive apps.		AC	20			AC=Purpose of record has been fulfilled	A	(Program ended in 2010. VIP Files will need to be disposed in 2033)	
CH13		Fund Raisers	List of contributors	PM							
CH15		Special Events	Info on conferences/tours.	PM						NOTE: Date processing planning records are not archival.	
CH16		Visionaries in Preservation Files	Correspond. And records generated in association with community meetings.	AC	20			AC=Purpose of record has been fulfilled.		Files include some photos & slides. (Program ended in 2010. VIP Files will need to be disposed in 2033)	
CH17		Visionaries in Preservation Applications (active/inactive)		AC	20			AC=Purpose of record has been fulfilled.		Files include some photos & slides. (Program ended in 2010. VIP Files will need to be disposed in 2033)	
CH18		Texas Capital Fund Applications	Program of Texas Dept. of Agriculture/TDA and Main Street, dealing with infrastructure grants for Main Street Communities. Scored by Interagency Council.	AC	20			AC=Purpose of record has been fulfilled.		Files include some slides.(Program ended in 2010. VIP Files will need to be disposed in 2033)	



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CH19	4.7.008	Certified Local Government Grants		AC	3			AC = Satisfaction of all Uniform Administrative Requirements For Grants and Cooperative Agreements to State and Local Governments (the Common Rule).		CAUTION: Retention Requirements May Vary Depending upon the Specific Federal Funding Agency. Agencies Must Ensure That Records Are Retained for the Appropriate Retention period.	
CH20		Visionaries in Preservation Grants		AC	20			AC=Conditions of grant fulfilled or expiration, termination of grant process.		Program ended in 2010. VIP Files will need to be disposed in 2033	
CH21		Certified Local Government City/County Files (active/inactive)		AC	20			AC=Purpose of record has been fulfilled.			
CH22A	1.1.020	Open Records Requests - Not Exempted/Exempted	Includes all correspondence and documentation relating to requests for records that are furnished to the public under the Public Information Act (Chapter 552, Government Code). Also includes withdrawn requests.	AC	2			AC = Date request fulfilled or date of notification that records are exempt.		"Includes RSIN 1.1.021"	
CH23	1.1.026	"Texas Register" Submissions	Copies of all proposed, withdrawn, emergency & adopted rules; open be; documents required by law to be submitted to be "Texas Register"	AC	1			AC = Date of publication in the Texas Register.			



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CH24	1.1.040	Speeches, Papers & Presentations	Notes or text of speeches, papers reports delivered for the THC by the CHD staff	AC	2			AC = Termination of service state possession or termination of program.	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	
CH25	1.1.064	Performance Measures Documentation	Any records of an agency needed for the 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						
CH26	1.1.068	Performance Measures Reports	Quarterly and annual reports on agency performance measures submitted to executive and legislative offices.	AC	6			AC=September 1 of odd-numbered calendar years.			
CH27	1.1.069	Activity Reports	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					Reports compiled by the CHD staff on a daily or other periodic basis pertaining to workload monitoring, task completion times, number of public contacts & similar activities.	



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CH28A	1.1.070	Agency Rules, Policies & Procedures -- Final (internally/externally).	Used in development of manuals, guidelines, administrative rules, or similar records for distribution internally or externally.	AC	3			AC= Until superseded or termination of program, rules, policies or procedures.	R	Convenience Copies. 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.	
CH29A	1.2.001	Destruction Authorizations		FE	3					Documents authorizing final disposition of records under a certified records retention schedule. Convenience copies. Originals with Admin. Division.	
CH29B	1.2.005	Records Retention Schedule (SLR 105)		US						Convenience copies. Original with Admin. Division.	
CH29C	1.2.006	Records Transmittal Forms		AC	2			AC= Date of authorization for destruction, permanent transfer from storage or transfer to the Archives and Information Services Division of TSLAC by THC Records Management officer.		Convenience copies.	
CH29E	1.2.010	Records Disposition Logs – CHD only.			10					Division use only. Agency-wide log With Administrative Division.	
CH29F	1.2.011	Records Center Storage Approval Forms (RMD 106) – CHD only.		US						Division use only. Convenience copies only. Originals with Administrative Division.	



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CH29G	1.2.012	Records Inventory Worksheets – CHD only and notes.		US						Worksheets for all THC divisions kept and Administrative Division.	
CH29H	1.2.014	Records Management Plans		US	1					Convenience copies only. Originals with Administrative Division.	
CH29I	1.2.015	Disaster Recovery Service Transmittals (Are in D109) – CHD only.		FE	1					Convenience copies only. Originals with Administrative Division.	
CH29J	1.2.016	Disaster Recovery Service Approval Form (RMD 113) – CHD only.		AC				AC = Until superseded or termination of service.		Convenience copies only. Originals with Administrative Division.	
CH30A	2.1.007	Computer Software Programs	Agency-developed automated software applications, operating system files, and associated processing files, including job control language, programs, applications, scripts, source code, etc.	AC				AC = Until electronic records are transferred to & 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 reading retrieved & read.		Programs for CHD use only. 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.
CH30B	2.1.008	Hardware Documentation	Records documenting operation & maintenance requirements of computer hardware such as operating manuals, hardware/operating system requirements, hardware configurations & equipment control systems.	AC				AC = Until electronic records are transferred and made usable in a new hardware (See RRS 4th Edition).		For CHD use only. 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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Rev. 2021-07

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CH30C	2.2.016	Software Registrations, Warranties & License Agreements	Only Programs Used by CHD & Not kept by I.T. Department.	LA	3						
CH31	5.1.004	Mail & Telecommunication Listings	Includes Texas Main Street Managers Lists, CLG & Visionaries and Preservation Contact Lists & all other contactless.	US						Any mailing address, telephone, fax number or email address records maintained by CHD on its employees or on entities or persons it serves.	
CH32	5.1.014	Office Procedures - CHD Internally Distributed Only.		US	1						
CH33	5.1.015	Correspondence Tracking Records	Includes U.S. Postal Service Certified Mail, UPS, or Fed Ex Shipping Labels/Tracking Slips.		1						
CH34A	5.2.010	Equipment Manuals		LA							
CH34B	5.2.011	Equipment Warranties		AC	1			AC=Warranty term expired.			
CH34C	5.2.008	Equipment History File; Equipment Service Agreements	Includes requests for installation, movies, service, etc.; and service/repair's logbooks, etc.	LA	3						
CH35	1.1.038	Customer Surveys	Surveys soliciting feedback from customers or clients of an agency, and the statistical data maintained rating an agency's performance.	AC	3			AC = final disposition of summary report.		COMMENT: See 1.1.067 for summary reports compiled from customer surveys.	



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CH36A	1.1.067	Report & 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, by 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	ARCHIVES NOTE: Reports are archival when they deal with significant aspects of the agency's programs. For agencies that have had an archival appraisal, separate this records series by each type of archival coding.	
CH36B	1.1.065	Reports & Studies (Non-Fiscal) – RAW DATA	Info or data collected and compiled for purpose of producing non--fiscal reports.	AV							
CH37	5.1.011	CHD Photocopier Use Logs & Reports	Registers or logs of print copies and fax transmissions made by user or in total.	AV							
CH40	3.4.006	CHD Monthly Timesheets	Includes CHD Monthly Signed-in/Sign-out Sheets & Leave Requests.		4						COMMENTS: 40 TAC 815.106(i).
CH41	3.3.025	CHD Division Job Procedure Records	Any documents detailing the procedural duties and responsibilities of agency positions on a position-by-position basis.	US	3						
CH42	3.3.023	Friends of the THC Payment Request Forms	Completed by CHD Staff.	FE	3						
CH43A	1.1.024	CHD Program Plans & Planning Records	Plans and records relating to the process of planning new or redefined programs, services, or projects of an agency that are neither included in nor directly related to other records series in this schedule.	AC	3			AC = Decision made to implement or not to implement result of planning process.	R	ARCHIVES NOTE: Data processing planning records are not archival.	



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CH43B	1.1.024	CHD Division Retreats	Plans and records relating to the process of planning new or redefined programs, services, or projects of an agency that are neither included in nor directly related to other records series in this schedule.	AC	3			AC = Decision made to implement or not to implement result of planning process.	R	<b>ARCHIVES NOTE:</b> Data processing planning records are not archival.	
CH44		Preserve America Community Files – Designated/Pending.		AC	20			AC = After awarded or denied.	R		
CH45		Heritage Tourism Partnership Grant Files		AC	20			AC = conditions of grant for filled or expiration, or termination of grant process.	R		
CH46		First Ladies Texas Treasure Awards Files		AC	20			AC = After awarded or denied.	R		
<b>HISTORY PROGRAMS DIVISION (HP)</b>											
HP1A	1.1.007	Correspondence-Administrative	Incoming outgoing and Internal correspondence, in any format, pertaining to the formulation, planning, implementation, interpretation, modification, or redefinition of the History Programs Division of the THC and the administrative regulations, policies, and procedures that govern them.		4				R	0	



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HP1B	1.1.008	Correspondence-General	Non-administrative incoming/outgoing and internal correspondence, in any media, pertaining to or arising from the routine operations of the polices, programs, services or projects of the History Programs Division of the THC.		2					CAUTION: This records series and item number 1.1.008 should be used only for correspondence that is not included in or directly related to another records series in this 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; a letter concerning an audit for that prescribed by item number 1.1.002, etc. SEE ALSO item number 1.1.011.	
HP2		Marker Program development		AV					A	Records will remain at agency until they cease to have frequent admin and research us - then transferred to State Library.	



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HP2A	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	ARCHIVES NOTE: Only the calendars, appointment, and itinerary records of elected officials, executive staff, board or commission members, division directors, and program heads require archival review. Contact the State Archives when these records have met their retention periods. 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.	
HP3	1.2.005	Records Retention Schedule (SLR 105)		US							
HP4	1.2.006	Records Transmittal Forms		AC	2			AC=Date of authorization for destruction, perm.		Transfer from storage or to Archives.	
HP6	1.2.010	Records Disposition Log	Logs or similar records listing records disposed of by an agency, which might include records series title, dates of records, and date of disposition.		20					*All audit requirements will be met prior to disposal.	



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					Years	Months	Days				
HP7	1.2.013	Record Control Materials	Documentation used to provide and improve access to records. Includes indexes, card files, shelf lists, registers, guides, and other finding aids.	AC				AC=When control aid is updated, revised, or no longer needed.		These records must carry the same retention period and archival code of the records they support.	
HP8		Cemetery Program Development		AV					A	These records will remain at the agency until the cease to have frequent administrative and research use. Then they will be transferred to the Library and Archives Commission.	
HP9	4.7.008	Unfunded Grant Application		AC	3			AC=Satisfaction of all Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments (the Common Rule.)			
HP10	4.7.008	Federal and State Grant Program		AC	3			AC=Satisfaction of all Uniform Administrative Requirements.			
HP12		Development of County Programs		AC	10			AC=No activity in 2 years.	E		
HP13	4.7.008	Museum Grants		AC	3			AC=Satisfaction of all Uniform Admin Requirements for grants and co-op agreements w/State and Local governments.		Merged w/museum files after 3 years.	



# STATE OF TEXAS Records Retention Schedule

SLR 105  
Rev. 2021-07

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					Years	Months	Days				
HP14		THC Annual Meetings Files		AC	5			AC=Purpose of Record has been fulfilled.			
HP15	1.1.057	Transitory Info (some email, notes, flyers)	Records of temporary usefulness that are not an integral part of a records series of an agency and are not essential to the fulfillment of statutory obligations or to the documentation of agency functions. Some examples of transitory information, which can be in any medium (voice mail, fax, email, hard copy, etc.) are routine messages; telephone message notifications; internal meeting notices; routing slips; incoming letters or memoranda of transmittal that add nothing of substance to enclosures; and similar routine information used for communication, but not for the documentation, of a specific agency transaction.	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).	
HP16		Awards and Honors (by THC & Counties)		PM							
*HP18		Museum Seminars/Workshops (development and planning)(includes Winedale)		AC	22			AC=No activity in two years.		Paper/photos should be reviewed by program director before purging	



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SLR 105  
Rev. 2021-07

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					Years	Months	Days				
*HP19		Museum Resource Files		AC	22			AC=No activity in two years.			
HP22		Rejected Marker Applications		AC				AC=No activity in 2 years.		Although rejected, these applications are a continuing and valuable resource because of the supporting documentation.	
HP23A		Marker Files – Paper and Electronic, Through Fiscal Year 2014		AV					A	These records will remain at the agency until they cease to have frequent administrative and research use. Then they will be transferred to the Library and Archives Commission.	
HP23B		Marker Files		PM						Master film at SRC; hardcopy in agency library; and there will be additional microfilm when funds allow.	
HP23C		Marker File – Electronic Only, Beginning in Fiscal Year 2015		AV					A	These will remain in the agency until they cease to have frequent administrative and research use. Then they will be transferred to the Library and Archives Commission.	
HP24		County Files. County Historical Commission/Chairmen		AV					A	These records will remain at the agency until they cease to have frequent administrative and research use. Then they will be transferred to the Library and Archives Commission.	



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SLR 105  
Rev. 2021-07

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HP25		Save Outdoor Sculpture (SOS) Records		PM					E	O=Electronic database, photograph, slides & surveys *see above note, but publications resulting from the SOS Proj. Are to be deposited in the State Pub Deposit.	
HP26	4.7.008	Historic Preservation Fund Grant Statistics		AC	20			AC=Satisfaction of all Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments (the Common Rule).			



**STATE OF TEXAS**  
**Records Retention Schedule**

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 Rev. 2021-07

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HP27	1.3.001	Publications	First Published versions. No subsequent revision & no other distributions. One copy of each state publication as defined on page xi of the state RRS 5th edition, except a publication that is subject to a different retention period in this schedule. For example, a meeting agenda (see RSIN 1.1.058) also meets the definition, but it must be retained permanently; RSIN 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, 441.103-441.105). The Texas State Library and Archives Commission will retain a copy of all state publications submitted to it on a continuing basis, subject to periodic evaluation to determine if the publication merits further retention. For additional information and requirements concerning state publications made available to the public through the internet, consult the administrative rules of the Texas State Publications Depository Program of the Texas State Library and Archives Commission (13 TAC §§3.1-3.8).	



# STATE OF TEXAS Records Retention Schedule

SLR 105  
Rev. 2021-07

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					Years	Months	Days				
HP28	1.1.058	State Board of Review minutes & agenda		PM					A	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.	



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Rev. 2021-07

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HP29A	1.1.060	Meetings, Audio/Video of Open Meetings	State Board of Review (SBR) and the THC History Committee	AC			90	AC=Official approval of written minutes of the meeting by the respective governing body -- i.e. SBR or THC History Committee.		CAUTION: It is an exception to the AC+90 days retention that if an agency does not prepare written minutes, it must retain recordings of open meetings permanently, following the same retention requirements of RSIN 1.1.058. See also caution comment at RSIN 1.1.058.	
HP29B	1.1.061	Meetings, Notes	Taken during open meetings of State Board of Review (SBR) and the THC History Committee from which written minutes are prepared.	AC			90	AC=Approval of the formal minutes by the SBR or THC History Committee respectively.			
HP31		Survey and Inventory (Files of Historic Resources)		AV					A	These records will remain at the agency until they cease to have frequent administrative and research use. Then they will be transferred to the Library and Archives Commission.	
HP32		County Files, National Register			5				E	Mainly correspondence; some contents will be transferred to NR proj. Files. *See note above.	
HP33		Pending and Inactive National Register Project Files		AC	50			AC=Registered or Determined Inactive.			



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Rev. 2021-07

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HP34	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).
HP36		National Resource Project Files		PM					E	US Park Service has original docs. *see note above.	
HP37		Historic Resources Slide, Maps & Drawing Files		AV					A	These records will remain at the agency until they cease to have frequent administrative and research use. Then they will be transferred to the Library and Archives Commission.	
HP38		National Register Supplemental Documentation		AV					A	These records will remain at the agency until they cease to have frequent administrative and research use. Then they will be transferred to the Library and Archives Commission.	
HP39	3.1.013	Employment Contracts		AC	7			AC=Expiration or Termination of the contract according to its terms.			SB20 (84th Leg.)
HP40	4.7.008	Survey and Planning Grants		AC	5			AC=Satisfaction of Administrative Requirements.		Ceased with FY 91,	



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HP42	5.4.011	Visitor Sign-in Sheets	Logs, registers, or similar records documenting visitors to limited access or restricted areas of agency facilities.		3						
HP43		Historic Endangered Landmarks Program		AV					R	Reviewed by archivist prior to destruction.	
HP44		Military Sites Program		AV					A	(Moved to HP from Architecture) Once admin. Value changes, send to TSLAC.	
HP45	1.1.006	Complaint Records	Received by THC's History Programs Division (HPD) from the public concerning the HPD & records pertaining to the resolution of the complaint.	AC	2			AC=Date of receipt, action taken, or final disposition of the complaint, whichever comes last.		CAUTION: If a complaint becomes subject of litigation (such as a lawsuit), it must be included in & is subject to minimum retention period of item number 1.1.048.	
HP46	1.1.020	Open Records Requests - Approved/Denied	Includes all correspondence and documentation relating to requests for records that are furnished to the public under the Public Information Act (Chapter 552, Government Code). Also includes withdrawn requests.	AC	2			AC = Date request fulfilled or date of notification that records are exempt.		"Includes RSIN 1.1.021"	
*HP49		Texas in World War II	Statewide County Surveys (2002) and supporting documents	PM							



# STATE OF TEXAS Records Retention Schedule

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*HP50		Oral History Program	Consists of the Texas Historical Commission's Oral History Collection conducted from 1971 to present covering a wide range of topics with a significant portion regarding World War II and the Cold War. Audio recordings, transcripts, oral history subject release forms and any other relevant materials.	AC	2			Date of interview	R	Archival Note: Interviews are ongoing. Following digitization and inspection for quality control by TSLAC, TSLAC may dispose of the original recording media at its discretion.	
HISTORIC SITES DIVISION (HS)											
HS1	1.1.006	Complaint File	Complaints and other unsolicited feedback received by an agency from the public concerning the agency and records pertaining to the resolution of complaints.	AC	2			AC= Date of receipt, action taken, or final disposition of the complaint, whichever comes last		CAUTION: If a complaint becomes subject of litigation (such as a lawsuit), it must be included in and is subject to minimum retention period of item number 1.1.048.	



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HS2	1.1.007	Correspondence-Administrative	Incoming outgoing and Internal correspondence, in any format, 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				R	ARCHIVES NOTE: Only the administrative correspondence of executive staff, board or commission members, division directors and program heads require archival review. Contact the State Archives when these records have met their retention periods. CAUTION: This records series and item number 1.1.008 should be used only for correspondence that is not included in or directly related to another records series in this 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; a letter concerning an audit for that prescribed by item number 1.1.002, etc. SEE ALSO item number 1.1.011.	



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HS3	1.1.008	Correspondence-General	Non-administrative incoming/outgoing and internal correspondence, in any media, pertaining to or arising from the routine operations of the polices, programs, services or projects of the Historic Sites Division of the THC		2					CAUTION: This records series item no. 1.1.007 and item number 1.1.008 should be used only for correspondence that is not included in or directly related to another records series on the THC'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; a letter concerning an audit for that prescribed by item number 1.1.002, etc. SEE ALSO item number 1.1.011.	



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HS4	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	ARCHIVES NOTE: Only the calendars, appointment, and itinerary records of elected officials, executive staff, board or commission members, division directors, and program heads require archival review. Contact the State Archives when these records have met their retention periods. 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.	
HS5	1.1.020	Open Records Requests, Approved/Denied	Includes all correspondence and documentation relating to requests for records that are furnished to the public under the Public Information Act (Chapter 552, Government Code). Also includes withdrawn requests.	AC	2			AC = Date request fulfilled or date of notification that records are exempt.		"Includes RSIN 1.1.021"	
HS6	1.1.026	Texas Register Submissions	Copies of all proposed, withdrawn, emergency, and adopted rules; open meetings notices; or any other documents required by law to be submitted to the Texas Register.	AC	1			AC = Date of publication in the "Texas Register."			



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HS7	1.1.057	Transitory Information	Records of temporary usefulness that are not an integral part of a records series of an agency and are not essential to the fulfillment of statutory obligations or to the documentation of agency functions. Some examples of transitory information, which can be in any medium (voice mail, fax, email, hard copy, etc.) are routine messages; telephone message notifications; internal meeting notices; routing slips; incoming letters or memoranda of transmittal that add nothing of substance to enclosures; and similar routine information used for communication, but not for the documentation, of a specific agency transaction.	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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HS8	1.1.043	Training Materials	Instructional materials and other records developed by an agency associated with training the entities or non-personnel individuals it regulates or serves, including but not limited to training manuals, course registration, class rosters, sign-in sheets, syllabuses, course outlines, and similar training aids used in external training programs.	AC	1			AC = Close of training session, after training materials superseded, or termination of training program, as applicable.		CAUTION: Does not include hazardous material training records. See RSIN 5.4.007.	
HS9	1.1.065	Reports & Studies, Non-Fiscal - Raw Data	Information or data collected and compiled for the purpose of producing non-fiscal reports.	AC	3			AC = Two years from date of collection.			
HS10	1.1.069	Reports – Activity (Monthly Statistics)	Reports compiled by agency personnel on a periodic basis pertaining to workload monitoring, task completion times, number of public contacts, and similar activities.	FE	3					CAUTION: see item number 1.1.064.. HSD retains in Austin but each State historic site retains its convenience copies.	
HS11	1.1.070	HSD Rules, Policies & 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 procedures that govern an agency's programs, services, or projects. Includes working files and related documentation used in creating rules, policies, and procedures.	AC	3			AC= Until superseded or termination of program, rules, policies or procedures.	R	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.	
HS13	5.4.011	Visitors Sign-in Sheets			3						



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Rev. 2021-07

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HS14		Fiscal Documents	To include deposit slips; Texnet transaction printouts; P.O.S. Printouts; credit card slips; daily activity.	FE	3					P.O.S. Is a computer system with cash register receipts, program & inventory reports. Originals maintained at each individual state historic site for entire retention period. No retention at HSD offices in Austin.	
HS15	5.2.002	Building Construction Project Files	To include architectural projects	PM					R	HSD retains in Austin while each state historic site retains its convenience copies. ARCHIVES NOTE: Archival review designation is for state-owned buildings only.	
HS16		Site Maintenance & Operational Files		FE	3					Each historic site will retain its own originals.	
HS17	5.2.008	Inspection, Repair, and Maintenance Records – Equipment	Equipment history file, which may include logbooks and requests for installation, moves, service, repair, etc.	LA	3					LA=Life of asset, date item is replaced. HSD retains in Austin while each state historic site retains its convenience copies.	
HS18	5.1.001	Contracts (non - purchasing) and Leases	includes leases HSD pays for & when HSD receives payment. EXCLUDES BUILDINGS.	AC	7			AC= End of contract or lease period. HSD retains in Austin while each state historic site retains its convenience copies.			SB20 (84th Leg.)
HS19		Sites History Files		PM						Includes all media. HSD retains in Austin while each state historic site retains its convenience copies.	



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SLR 105  
Rev. 2021-07

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A/I – Transfer to State/University Archivist  
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					Years	Months	Days				
HS20	5.2.003	Sites Blueprints		PM					R	Includes all media. HSD retains in Austin while each state historic site retains its convenience copies.	
HS21	5.2.026	Sites Events/Programs Files		AC	5			AC=Date of event completion.		Respective records kept at each individual state historic site for entire retention period.	
HS22A	1.1.040	Outreach, Public Service, Presentations and Speeches - State Historic Sites Staff Only	Notes or text of speeches, papers, presentations, or reports delivered in conjunction with agency work.	AC	2			AC = Date presentation completed.	R	ARCHIVE NOTE: only speeches, papers, and presentations given by or on behalf of executive staff, board or commission members, and division directors and program heads require archival review. Conducted by site staff. Each individual state historic site keeps its respective records for entire retention period.	
HS22B	1.1.040	Outreach, Public Service, Presentations and Speeches - Historic Sites Division Austin Staff Only.	Notes or text of speeches, papers, presentations, or reports delivered in conjunction with agency work.	AC	2			AC=Date presentation completed.	R	ARCHIVE NOTE: only speeches, papers, and presentations given by or on behalf of executive staff, board or commission members, and division directors and program heads require archival review. Conducted by HSD staff from Austin. Retained at HSD for entire retention period.	



# STATE OF TEXAS Records Retention Schedule

SLR 105  
Rev. 2021-07

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HS23	1.1.078	Releases of Liability		AC	3			AC= Date of cessation of activity for which the waiver was signed.		Each individual state historic site compiles forms for all events by fiscal year & retains originals on site for entire retention period.	
HS24		Mileage Reports		AC			90	AC=End of month regarding individual vehicle monthly vehicle log/report.		HSD retains convenience copies only.	
HS25	1.1.008	Sites Friends Groups - General Correspondence		FE	3					HSD retains original & each state historic site retains convenience copies of its related Friends group.	
HS26		Sites Friends Groups - Memorandums of Agreement & related correspondence		US	3					HSD retains Originals & each state historic site retains convenience copies of its related Friends group. ARCHIVES NOTE: Only the administrative correspondence of executive staff, board or commission members, division directors and program heads require archival review. Contact the State Archives when these records have met their retention periods.	



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SLR 105  
Rev. 2021-07

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HS27	1.1.067	Sites Friends Groups - Annual Plans & related correspondence	Annual, sub-annual, plan or special reports or studies on non-fiscal aspects of an agency's programs, services, or projects compiled by agency personnel, by 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.	FE	3				R	ARCHIVAL NOTE: Reports are archival when they deal with significant aspects of the agency's programs. For agencies that have had an archival appraisal, separate this records series by each type of archival coding, A, R, or E. S Archival review required before disposal. HSD retains Originals & each state historic site retains convenience copies of its related Friends group.	
HS29	5.4.001	Occupational Accident Reports and Associated Documentation	Accident or occupational disease reports (by supervisors and employees) and other associated reports required to be submitted to the State Office of Risk Management (SORM) or its predecessors or maintained internally on accident frequency.	CE	5					HSD retains Originals & each state historic site retains convenience copies of its related Friends group. The Texas Department of Insurance retains copies of the reports submitted to it for 50 years.	29 CFR 1904.33; 28 TAC 120.1(c).
HS30		Volunteer Files	May include volunteer applications & related documents, contact information, electronic lists, etc.	AC	3			AC=Date volunteer became inactive.		Each state historic site keeps original records on its volunteers for entire retention period.	
HS31		Volunteer newsletters, meetings information, training for volunteers, volunteers activity logs.		FE	1					Each state historic site keeps original records on its volunteers for entire retention period.	



# STATE OF TEXAS Records Retention Schedule

SLR 105  
Rev. 2021-07

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HS32		Exhibit Administrative Files – Working Files		AC	2			AC = Date of final exhibit installation.		Retention at HSD.	
HS33		Exhibit Administration Files - Final	Includes design, as built, & maintenance manuals	US	25				R	Retention at HSD for US+5, then moved to Texas Historical Commission's curatorial storage facility for 20 years storage.	
HS34		Interpretive Master Plans – Working Files		US	10				R	Retention at HSD for US +5, the move to Texas Historical Commission Curatorial storage facility for another 5 years of storage.	
HS35	1.1.024	Interpretive Master Plans - Final Plans		PM				Plans and records relating to the process of planning new or redefined programs, services, or projects of an agency that are neither included in nor directly related to other records series in this schedule.	E	Includes all media. HSD retains in Austin while each state historic site retains its convenience copies.	
HS36	1.1.043	Children's Education Material files	For working with teachers and class visits.	US	5					HSD to maintain at Austin. No state historic sites retention necessary.	
HS37		Museum Object Loan documents	Loans of collections.	AC				AC=Completion of Loan (object returned to collection).		Entire retention at HSD with Registrar.	
HS38		Deeds of Gifts(s)	Artifacts, etc. For collections	PM						Entire retention at HSD with Registrar. Each state historic site retains its convenience copies.	



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SLR 105  
Rev. 2021-07

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HS39		Deaccession Files	For artifacts, ets. In collections	PM						Entire retention at HSD with Registrar. Each state historic site retains its convenience copies.	
HS40		Object Worksheets		AV						Retained at each individual state historic site.	
HS41		Catalog Records		PM						Retained at HSD in Austin.	
HS42	2.2.001	"HOBO" System Monitoring Records Reports - Raw Data (readings).		FE	2					HSD retains in Austin while each state historic site retains its own convenience copies.	
HS43	2.2.001	"HOBO" System Reports/Data analysis		PM						HSD retains in Austin.	



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Rev. 2021-07

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HS44A	1.1.061	Meetings - Notes	Notes taken during open meetings of state boards, commissions, committees (THC Historic Sites committee), and councils from which written minutes are prepared.	AC			90	AC= Approval of the written minues by the governing body. See caution comment at RSIN 1.1.058		Convenience Copies - original are forwarded to Administration Div. for filing with the THC quarterly meeting records. 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.	
HS44B	1.1.061	Meeting Notes and Supporting Documentation	Notes taken during open meetings of Historic Sites Committee and any supporting documentation from which formal minutes are prepared.	AC			90	AC= Approval of the formal minutes by the Historic Sites Committee			



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HS45	1.1.060	Audio or video recording of meetings	Recorded during open meetings of Historic Sites Committee from which written minutes are prepared.	AC			90	AC= Approval of the formal minutes by the Historic Sites Committee.		Administration Division retains permanent written records of these minutes.	
HS47	1.1.059	Certified Agendas or tape recording of close meetings of the Historic Sites Committee.		AC	2			AC= The date of the meeting or completion of pending action involving the meeting, whichever is later.			Government Code, 551.104 (a).
HS48	1.1.063	Staff Meeting Notes and Notes	Minutes or notes, and supporting documentation, taken at internal agency staff meetings. Historic Sites Division staff meetings and site manager meetings only.	FE	1					HSD retains.	
HS49	1.1.064	Agency Performance Measures Documentation	Only Historic Sites Division's.	FE	3					HSD retains copies of supporting documentation for same period as the actual documentation submitted to Staff Services Division for Submitting the THC's appropriations request.	
HS50	1.2.101	Records Disposition Log(s)	Logs or similar records listing records destroyed or transferred to the Archives and Information Services Division , TSLAC., showing records series title, dates of records, and date destroyed or transferred				10			CAUTION: Disposition can mean destroyed or transferred.	



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HS51	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.	
HS52	1.2.012	Record Inventory Worksheets	Worksheets or working papers used to capture records inventory information, including location tracking and to document existence and requirements of a records series.	US							
HS53		Records Control Locator Aids		AC				AC=when control aid is updated, revised, or no longer needed.		CAUTION: These records must carry the same retention period and archival code of the records they support.	
HS54		Public Relations Records	News or Press Release. HSD retains in Austin while each state historic site maintains its convenience copies.		2						
HS55	1.3.001	Historic Sites Division Publications	Includes Site rack cards, visitor guides, guide books, Historic Heights brochure, and Set Your Sites on History brochure	US	2					First Published versions. No subsequent revision & no other distributions. Sending a copy to the Texas Publications Depository of the TSLAC fulfills the archival requirement.	
HS56	5.2.028	Building Construction Contract and Inspection Records	Site residence inspection files	LA	10		R			See also RSIN 5.2.002 and 5.2.003a/b.	
COMMUNICATIONS [Formerly Public Information & Education, aka Marketing Communications Division] (MC)											
MC1	1.1.069	Monthly Reports			5					Maintained electronically.	



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MC2	1.1.007	Correspondence, Administrative.	Memo & letters relating to the development & administration of agency policies, procedure, programs & other major transactions		4				R	O=Open record E=Electronic P=Paper ARCHIVES NOTE: Only the administrative correspondence of executive staff, board or commission members, division directors and program heads require archival review. Contact the State Archives when these records have met their retention periods.	
MC4	1.1.063	Meeting Minutes/Notes-Staff (PUB quarterly meetings).			1					O=Open record P=Paper	
MC5	1.1.019	Public Relations Records	News, press releases, marketing files and collateral, or any public relations files maintained or issued by an agency. Includes print, electronic, audio, and audiovisual records.		2				R	E=Electronic	



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					Years	Months	Days				
MC6	1.3.002	Publication Development Files	Physical and digital development and design files used to create State Publications, including but not limited to background material, copy (drafts), original artwork, photo negatives, prints, flats, etc. This includes all work performed both inside and outside the agency.	AV					R	O=Open Record E=Electronic P=Paper. See RSIN 1.3.001 for final State Publications created from development files. 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.	



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					Years	Months	Days				
MC7	1.3.001	Agency Publication (Record Copy)	First Published versions. No subsequent revision & no other distributions. One copy of each state publication as defined on page xi of the state RRS 5th edition, except a publication that is subject to a different retention period in this schedule. For example, a meeting agenda (see RSIN 1.1.058) also meets the definition, but it must be retained permanently; RSIN 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, 441.103-441.105). The Texas State Library and Archives Commission will retain a copy of all state publications submitted to it on a continuing basis, subject to periodic evaluation to determine if the publication merits further retention. For additional information and requirements concerning state publications made available to the public through the internet, consult the administrative rules of the Texas State Publications Depository Program of the Texas State Library and Archives Commission (13 TAC §§3.1-3.8).	
MC8	3.3.023	Reimbursable Activities, Requests and Authorizations to Engage in		FE	3					O=Open record P=Paper *All audit requirements will be met prior to disposal.	



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SLR 105  
Rev. 2021-07

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MC10		Reference materials	Includes information brochures	US						O=Open Record P=Paper E=Electronic	
MC13	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	ARCHIVES NOTE: Only the calendars, appointment, and itinerary records of elected officials, executive staff, board or commission members, division directors, and program heads require archival review. Contact the State Archives when these records have met their retention periods. 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.	



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MC14	1.1.057	Transitory information (email, notes and flyers)	Records of temporary usefulness that are not an integral part of a records series of an agency and are not essential to the fulfillment of statutory obligations or to the documentation of agency functions. Some examples of transitory information, which can be in any medium (voice mail, fax, email, hard copy, etc.) are routine messages; telephone message notifications; internal meeting notices; routing slips; incoming letters or memoranda of transmittal that add nothing of substance to enclosures; and similar routine information used for communication, but not for the documentation, of a specific agency transaction.	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).	
MC17	1.1.066	Reports - Biennial or Annual Agency		AC	6			AC=September 1 of odd-numbered calendar years.	A	O=Open Record P=Paper E=Electronic A=Transfer to State Archives Copies sent to the Publication Depository Program (TSLAC) fulfill the archival mandate.	



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SLR 105  
Rev. 2021-07

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MC18	1.1.055	Strategic Plans		AC	6			AC=September 1 of odd-numbered calendar years.		O=Open Record P=Paper E=Electronic A=Transfer to State Archives Copies sent to the Publication Depository Program (TSLAC) fulfill the archival mandate.	
MC19a	1.1.070	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 procedures that govern an agency's programs, services, or projects. Includes working files and related documentation used in creating rules, policies, and procedures.	AC	3			AC= Until superseded or termination of program, rules, policies or procedures, whichever applicable.	R	O=Open Record P=Paper E=Electronic R=Review by State Archivist 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.	
MC20	1.1.023	Organizational 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. (See AM7).	



**STATE OF TEXAS**  
**Records Retention Schedule**

SLR 105  
 Rev. 2021-07

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MC21	1.1.040	Speeches	Notes or text of speeches or reports delivered in conjunction with agency work	AC	2			AC= End of event, until superseded, or obsolete.	R	ARCHIVE NOTE: only speeches, papers, and presentations given by or on behalf of executive staff, board or commission members, and division directors and program heads require archival review. Includes "talking points" for THC Chairman, THC Commissioners, Executive Director, & Deputy Executive Director. Files kept in Marketing Communications Division. After 2 Years, Prints and Transfer to TSLAC. After Confirmation of Receipt, delete electronic copies.	
MC22	1.1.006	Complaint Records	Received by the Communications Division of the THC from the public concerning COMMs and records pertaining to the resolution of the complaint.	AC	2			AC= Date of receipt, action taken, or final disposition of the complaint, whichever comes last		CAUTION: If a complaint becomes subject to litigation (such as a lawsuit), it must be included in and is subject to minimum retention period of item number 1.1.048.	
MC23	1.1.020	Open Records Requests - Approved/Denied	Includes all correspondence and documentation relating to requests for records that are furnished to the public under the Public Information Act (Chapter 552, Government Code). Also includes withdrawn requests.	AC	2			AC = Date request fulfilled or date of notification that records are exempt.		"Includes RSIN 1.1.021"	



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Rev. 2021-07

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					Years	Months	Days				
MC24	1.1.061	Meeting Notes	Taken during open meetings from which written minutes are prepared	AC			90	AC = Approval of the formal minutes of the meeting by the Public Information & Education Committee (formally Marketing – Communications Committee).			



# STATE OF TEXAS Records Retention Schedule

SLR 105  
Rev. 2021-07

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					Years	Months	Days				
MC25a	1.1.007	Correspondence-Administrative	Incoming outgoing and Internal correspondence, in any format, pertaining to the formulation, planning, implementation, interpretation, modification, or redefinition of the programs, services, or projects of the Communications Division (Formally Public Information & Education Department)of the THC and the administrative regulations, policies, and procedures that govern them.		4				R	ARCHIVES NOTE: Only the administrative correspondence of executive staff, board or commission members, division directors and program heads require archival review. Contact the State Archives when these records have met their retention periods. CAUTION: This records series and item number 1.1.008 should be used only for correspondence that is not included in or directly related to another records series on the THC'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; a letter concerning an audit for that prescribed by item number 1.1.002, etc. SEE ALSO item number 1.1.011.	



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SLR 105  
Rev. 2021-07

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					Years	Months	Days				
MC25b	1.1.008	Correspondence-General	Non-administrative incoming/outgoing and internal correspondence, in any media, pertaining to or arising from the routine operations of the polices, programs, services or projects of the Communications Division (Formally Public Information & Education Department) of the THC.		2					CAUTION: This records series item no. 1.1.007 and item number 1.1.008 should be used only for correspondence that is not included in or directly related to another records series on the THC'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; a letter concerning an audit for that prescribed by item number 1.1.002, etc.	
HOLOCAUST GENOCIDE ANTISEMITISM ADVISORY COMMISSION (HGC) formerly known as TX HOLOCAUST AND GENOCIDE COMMISSION											
HGC1	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			AC = Publication or release of final audit findings.		The State Auditor's Office (SAO) retains any copies of its audits performed on Texas state agencies.	



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SLR 105  
Rev. 2021-07

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HGC2	1.1.007	Correspondence - Administrative	Incoming/outgoing and internal leadership, supervisory, managerial, executive, administrative, substantive, and other high-level correspondence in any media, including electronic communication, 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				R	ARCHIVES NOTE: Only the administrative correspondence of executive staff, board or commission members, division directors and program heads require archival review. Contact the State Archives when these records have met their retention periods. CAUTION: This records series and RSIN 1.1.008 should be used only for correspondence that is not included in or directly related to another records series on the agency's approved schedule. For example, a memorandum that documents an appropriations request must be retained for the minimum retention period prescribed by RSIN 1.1.004; a letter concerning an audit for that prescribed by RSIN 1.1.002, etc. See also RSIN 1.1.011.	



# STATE OF TEXAS Records Retention Schedule

SLR 105  
Rev. 2021-07

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HGC3	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 RSIN 1.1.007. See also RSIN 1.1.010.	
HGC4	1.1.010	Directives	Any document that officially initiates, rescinds, or amends general office procedures.	US	1						
HGC5	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		



**STATE OF TEXAS**  
**Records Retention Schedule**

SLR 105  
 Rev. 2021-07

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HGC6	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	ARCHIVES NOTE: Only the calendars, appointment, and itinerary records of elected officials, executive staff, board or commission members, division directors, and program heads require archival review. Contact the State Archives when these records have met their retention periods. 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.	



# STATE OF TEXAS Records Retention Schedule

SLR 105  
Rev. 2021-07

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HGC7	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, or opinions rendered for Public Information Act Requests. See RSIN 1.1.048, 1.1.020, and 1.1.021. 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. See page ix for additional guidelines.	
HGC8	1.1.019	Public Relations Records	News, press releases, marketing files and collateral, or any public relations files maintained or issued by an agency. Includes print, electronic, audio, and audiovisual records.		2				R		
HGC9	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 the Public Information Act (Chapter 552, Government Code). Also includes withdrawn requests.	AC	1			AC = Date request fulfilled or withdrawn.			



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Rev. 2021-07

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					Years	Months	Days				
HGC10	1.1.021	Public Information Requests - Excepted	Includes all correspondence and documentation relating to requests for records that are excepted under the Public Information Act (Chapter 552, Government Code), including records provided to the legislature under section 552.008.	AC	2			AC = Date of notification that records are excepted.			
HGC11	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	<b>ARCHIVES NOTE:</b> 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.	
HGC12	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 neither included in nor directly related to other records series in this schedule.	AC	3			AC = Decision made to implement or not to implement result of planning process.	R	<b>ARCHIVES NOTE:</b> Data processing planning records are not archival.	
HGC13	1.1.026	Texas Register Submissions	Copies of all proposed, withdrawn, emergency, and adopted rules; open meetings notices; or any other documents required by law to be submitted to the Texas Register.	AC	1			AC = Date of publication in the Texas Register.			



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SLR 105  
Rev. 2021-07

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					Years	Months	Days				
HGC14	1.1.027	Proposed Legislation	Drafts of proposed legislation and related correspondence.	AV							
HGC15	1.1.038	Customer Surveys - Evaluation of Teacher Workshops	Surveys soliciting feedback from 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 RSIN 1.1.067 for summary reports compiled from customer surveys.	
HGC16	1.1.040	Speeches, Papers, and Presentations	Notes or text of speeches, papers, presentations, or reports delivered in conjunction with agency work.	AC	2			AC = End of event, until superseded, or obsolete.	R	<b>ARCHIVES NOTE:</b> 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.	
HGC17	1.1.043	Training Materials	Instructional materials and other records developed by an agency associated with training the entities or non-personnel individuals it regulates or serves, including but not limited to training manuals, course registration, class rosters, sign-in sheets, syllabuses, course outlines, and similar training aids used in external training programs.	AC	1			AC = Close of training session, after training materials superseded, or termination of training program, as applicable.		See RSIN 3.3.030 for internal personnel training materials. CAUTION: Does not include hazardous material training records. See RSIN 5.4.007.	



**STATE OF TEXAS**  
**Records Retention Schedule**

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HGC21	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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HGC22	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					A	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.	
HGC23	1.1.059	Meetings, Agendas and Minutes or 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.		See caution comment at RSIN 1.1.058.	



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HGC24	1.1.060	Meetings, Audiovisual Recordings of Open	Audiovisual recordings of open meetings of state boards, commissions, committees, and councils.	AC			90	AC= Approval of written minutes of the meeting by the governing body of an agency.		<b>CAUTION:</b> It is an exception to the AC+90 days retention that if an agency does not prepare written minutes, it must retain recordings of open meetings permanently, following the same retention requirements of RSIN 1.1.058. See also caution comment at RSIN 1.1.058.	
HGC25	1.1.061	Meetings – Notes	Notes taken during open meetings of state boards, commissions, committees, and councils from which written minutes are prepared.	AC			90	AC= Approval of the written minutes by the governing body.		See caution comment at RSIN 1.1.058.	
HGC26	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.	



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Rev. 2021-07

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HGC30	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 procedures that govern an agency's programs, services, or projects. Includes working files and related documentation used in creating rules, policies, and procedures.	AC	3			AC = Until superseded, or termination of program, rules, policies, or procedures, whichever applicable.	R	<b>ARCHIVES NOTE:</b> 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.	
HGC31	1.1.072	Public Information Reports	Reports made to the Office of Attorney General (OAG) on an agency's Public Information Act activities, per Government Code, 552.010.		2						
HGC32	1.1.074	Sunset Review Report and Documentation	Sunset Review Report, agency self-study, and other correspondence and supporting documentation related to the Sunset review process for state agencies.	AC	3			AC = After the subsequent Sunset Review.	R		
HGC33	1.2.001	Destruction Authorizations	Documents authorizing final disposition of records under a certified records retention schedule. Records may also include destruction authorizations (e.g. form RMD 102) approved by Texas State Library and Archives Commission.		3					<b>CAUTION:</b> If destruction authorizations are maintained as part of RSIN 1.2.010 (Records Disposition Logs), then longer retention period applies.	



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Rev. 2021-07

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HGC34	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.	
HGC35	1.2.010	Records Disposition Logs	Logs or similar records listing records disposed of by an agency, which might include records series title, dates of records, and date of disposition.		10					<b>CAUTION:</b> Disposition can mean destroyed or transferred.	
HGC36	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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SLR 105  
Rev. 2021-07

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HGC37	4.7.008	Grant Records	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).		<b>CAUTION:</b> Retention requirements may vary depending on the specific funding agency. Records in this series may be subject to Government Code 441.1855. Agencies must ensure that records are retained for the appropriate retention period.	
HGC40	5.1.003	Delivery Reports	Records documenting incoming or outgoing deliveries, including through private courier services.		2						
HGC41	5.1.004	Mail and Telecommunications Listings	Any mailing address, telephone or fax number, or email address records maintained by an agency on its employees or on entities or persons it serves.	US							
HGC42	5.1.005	Postage Records	Records and reports of postage expenses, including postal meter usage.	FE	3						
HGC43	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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SLR 105  
Rev. 2021-07

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HGC44	5.3.004	Shipping Information	Shipping information, including order acknowledgements, packing slips, and related documentation.	AV						<b>CAUTION:</b> Some shipping information may require longer retention period. State agencies must determine if longer retention period is required based on the type of materials shipped to or from their agency.	
HGC50	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.	