



March 18, 2013

Ms. Linda Gaby
Director of Administration
Texas State Preservation Board
Suite 950
Sam Houston Bldg.
Austin, TX 78701

RE: Texas State Preservation Board
Retention schedule approved for use.

Dear Ms. Gaby:

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 Please ensure all old copies of the schedule are superseded with this recertified copy.

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

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

Your efforts in maintaining an up-to-date records retention schedule are appreciated. It not only helps to ensure the integrity of your recordkeeping practices, but it is also essential to the success of your records management program. Your schedule will be due for recertification on the last working day of March 2016. If you have any questions, call the information analyst assigned to your agency, Michael Reagor, at 512-463-5494.

Sincerely,

Craig Kelso
Director and State Records Administrator

Enclosure
cc: State Auditor, State Archivist
cc: (without enclosure) John Sneed

State and Local
Records Management

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Commission Chairman
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Director and Librarian*
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*Preserving yesterday,
informing today,
inspiring tomorrow.*

R01-809/809



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 809

Agency Name State Preservation board

(Check one)

- Initial Certification - Form SLR 105
xx 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
xx Records Management Officer

Signature Linda Gaby
Name (Print or type) Linda Gaby
Date July 24, 2012

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 Donna Osborne
Name (Print or type) Donna Osborne
Date 3/11/13

Cert/Recert No. 6 Amendment No. -

CAUTION

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

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





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Records Retention Schedule

SLR 105
Form SLR 105C must accompany this form.

1. Page 1 of 59

2. Agency Code 809		3. Agency Name State Preservation Board						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total			

1.1.002	1	Audits Audits and reviews performed by or on behalf of an agency, including the working papers that support the audit. Also includes audits performed on the agency.	AC + 7		AC + 7		AC = Publication or release of final audit findings. The State Auditor's Office retains any copies of its audits performed on Texas state agencies.		
1.1.004	2	Legislative Appropriation Requests Including any supporting documentation created and/or used to justify and support legislative appropriations requests by an agency.	AC	6	AC + 6	A	AC = September 1 of odd-numbered calendar years. ARCHIVES NOTE: The archival requirement is met by sending the required copies of the requests to the Texas State Publications Depository Program, Texas State Library and Archives Commission. Only copies of supporting documentation submitted to the Legislative Budget Board are archival.	94-809-005	
1.1.006	3	Complaint Records Complaints received by an agency from the public concerning the agency and records pertaining to the resolution of the complaint.	AC + 2		AC + 2		AC = Final disposition of the complaint. CAUTION: If a complaint becomes the subject of litigation, it must be included in and is subject to the minimum retention period of item number 1.1.048.		

Retention Codes (Field 7)	Archival Codes (Field 8)
AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	A – Transfer to State Archives R – Review by State Archivist
CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months
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2. Agency Code 809		3. Agency Name State Preservation Board							
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			Agency	Storage	Total	9. Remarks			

1.1.007	4	<p>Correspondence - Administrative Incoming/outgoing and internal correspondence pertaining to the formulation, planning, implementation, interpretation, modification, or redefinition of the programs, services, or projects of an agency and the administrative regulations, policies, and procedures that govern them.</p>	4	4	A	<p>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.</p> <p>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 agency's approved schedule. For example, a memorandum that documents an appropriations request must be retained for the minimum retention period prescribed by item number 1.1.004; a letter concerning an audit for that prescribed by item number 1.1.002, etc. SEE ALSO item number 1.1.011.</p>		
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			Agency	Storage	Total				

1.1.008	5	Correspondence - General Non-administrative incoming/outgoing and internal correspondence, in any media, pertaining to or arising from the routine operations of the policies, programs, services, or projects of an agency.	2		2		SEE comment to item number 1.1.007. SEE ALSO item number 1.1.010.		
1.1.010	6	Directives Any document that officially initiates, rescinds, or amends general office procedures.	US + 1		US + 1				
1.1.011	7	Executive Orders Any document that initiates, rescinds, or amends a regulation, policy, or procedure that governs the programs, services, or projects of an agency.	US + 3		US + 3	A			

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2. Agency Code	809	3. Agency Name	State Preservation Board		
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4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

1.1.013	8	Calendars, Appointment and Itinerary Records Calendars, appointment books or programs and scheduling, or itinerary records, purchased with state funds or maintained by staff during business hours that document appointments, itineraries, and other activities of agency officials or employees.	CE + 1		CE + 1	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.		
1.1.014	9	Legal Opinions and Advice From agency legal counsel or the Attorney General, including any requests eliciting the opinions.	AV		AV	R	CAUTION: Does not include legal opinions or advice rendered on a matter in litigation or with regard to pending litigation. SEE item number 1.1.048.		

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			Agency	Storage	Total				

1.1.019	10	Public Relations Records News, press releases, or any public relations files maintained or issued by an agency. Includes print, electronic, audio, and audiovisual records.	2	2	R			
1.1.020	11	Public Information Requests - Not Exempted Includes all correspondence and documentation relating to requests for records that are furnished to the public under Public Information Act (Chapter 552, Government Code).	AC + 1	AC + 1		AC = Date request fulfilled.		
1.1.021	12	Public Information Requests - Exempted Includes all correspondence and documentation relating to requests for records that are exempt under the Public Information Act (Chapter 552, Government Code).	AC + 2	AC + 2		AC = Date of notification that records are exempt.		
1.1.023	13	Organization Charts	US	US	A			
1.1.024	14	Plans and Planning Records Plans and records relating to the process of planning new or redefined programs, services, or projects of an agency that are not included in or directly related to other records series in this schedule.	AC + 3	AC + 3	R	AC = Decision made to implement or not to implement result of planning process. ARCHIVES NOTE: Data processing planning records are not archival.		

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

1.1.026	15	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 + 1		AC = Date of publication in the Texas Register.		
1.1.027	16	Proposed Legislation Drafts of proposed legislation and related correspondence.	AV		AV				
1.1.038	17	Customer Surveys Surveys returned by the customers or clients of an agency, and the statistical data maintained rating an agency's performance.	AC		AC		AC = Final disposition of summary report. SEE item number 1.1.067 for summary reports compiled from customer surveys.		
1.1.040	18	Speeches, Papers and Presentations Notes or text of speeches, papers, presentations, or reports delivered in conjunction with agency work.	AC		AC	R	AC = End of term in office or termination of service in a state position.		
1.1.041	19	Suggestion System Records Suggestions submitted by agency personnel and responses.	1		1				
1.1.043	20	Training Materials Instructional materials developed by an agency for training entities or individuals it regulates or serves.	US + 1		US + 1				

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			Agency	Storage	Total				

1.1.048	21	Litigation Files Records created by or on behalf of an agency in anticipation of or in the adjudication of a lawsuit.	AC + 1		AC + 1 R	AC = As applicable, decision of an agency not to file a lawsuit or decision that a lawsuit will not be filed against it on a matter; dismissal of a lawsuit for want of prosecution or on motion of the plaintiff; or final decision of a court (or of a court on appeal, if applicable) in a lawsuit. ARCHIVES NOTE: Cases that set legal precedent or exhibit historical value will be evaluated by the Archives and Information Services Division of the Texas State Library and Archives Commission for archival preservation.		
1.1.053	22	Registration Logs Logs or similar records used to register persons appearing before state agencies as required by Chapter 2004, Government Code, including quarterly reports filed with the Texas Ethics Commission.	AC		AC	AC = Report filed with the Texas Ethics Commission.		

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1.1.055	23	Strategic Plans Information resources and operational strategic plans prepared in accordance with 2054.095 and 2056.002, Government Code.	AC + 6		AC + 6	A	AC = September 1 of odd-numbered calendar years. ARCHIVES NOTE: The archival requirement is met by sending the required copies of the plans to the Texas State Publications Depository Program, Texas State Library and Archives Commission.		
1.1.056	24	ADA (Americans with Disabilities Act) Documentation Self evaluations and plans documenting compliance with the requirements of the Americans With Disabilities Act.	3		3		28 CFR 35.105(c).		

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

1.1.057	25	<p>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.</p> <p>Transitory records are not essential to the fulfillment of statutory obligations or to the documentation of agency functions. Some examples of transitory information, which can be in any medium (voice mail, fax, email, hard copy, etc.) are routine messages; 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.</p>	AC		AC		<p>AC = Purpose of record has been fulfilled.</p> <p>CAUTION: Records management officers should use caution in assigning this records series item number to records of an agency to make certain they are not part of another records series listed in this schedule or, for records series unique to an agency, are not part of a records series that documents the fulfillment of the statutory obligations of the agency or the documentation of its functions.</p> <p>The disposal of transitory information need not be documented through destruction signoffs (1.2.001) or in records disposition logs (1.2.010), but agencies should establish procedures governing disposal of these records as part of its records management plan (1.2.014).</p>	
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1.1.058	26	Meeting Agenda and Minutes Official agenda and minutes of state boards, committees, commissions, and councils that conduct open meetings as required by Government Code, Chapter 551.	PM	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 item numbers 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.		
1.1.059	27	Meetings, Certified Agendas or Tape Recordings of Closed Certified agendas or tape recordings of closed meetings of state boards, commissions, committees, and councils.	AC + 2	AC + 2		AC = The date of the meeting or completion of pending action involving the meeting, whichever is later. Government Code, 551.104(a). SEE caution comment at item number 1.1.058.		

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

1.1.060	28	Meetings, Audio or Videotapes of Open Audio or videotapes of open meetings of state boards, commissions, committees, and councils.	AC + 90 days		AC + 90 days	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. SEE caution comment at item number 1.1.058.		
1.1.061	29	Meeting - Notes Notes taken during open meetings of state boards, commissions, committees, and councils from which written minutes are prepared.	AC + 90 days		AC + 90 days	AC = Approval of the formal minutes by the governing body. SEE caution comment at item number 1.1.058.		

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2. Agency Code 809		3. Agency Name State Preservation Board						
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			Agency	Storage	Total			
1.1.062	30	Meetings - Supporting Documentation Documents submitted at meetings of state boards, commissions, committees, and councils including exhibit items, documentation for agenda items, etc. Includes documents sent in advance of meetings for briefing purposes, some of which may not be submitted at an actual meeting.	2		2	A	SEE caution comment at item number 1.1.058.	
1.1.063	31	Staff Meeting Minutes and Notes Minutes or notes, and supporting documentation, taken at internal agency staff meetings.	1		1			
1.1.064	32	Agency 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		FE + 3		CAUTION: The FE + 3 retention period overrides any shorter retention period for a records series in this schedule if the records series is needed for documentation of agency performance measures.	

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1.1.065	33	Reports and Studies (Non-Fiscal) - Raw Data Information or data collected and compiled for the purpose of producing non-fiscal reports.	AV	AV		CAUTION: Does not include source documentation used for information or data included in or directly related to another records series in this schedule. SEE especially item number 1.1.064.		
1.1.066	34	Reports - Biennial or Annual Agency (Narrative) Biennial narrative reports to the governor and legislature as required by an agency's enabling statutes, including annual narrative reports if they are required by statute.	AC + 6	AC + 6	A	AC = September 1 of odd-numbered calendar years. ARCHIVES NOTE: The archival requirement is met by sending the required copies of the reports to the Texas State Publications Depository Program, Texas State Library and Archives Commission.		
1.1.067	35	Reports and Studies (Non-Fiscal) Annual, sub-annual, or special reports or studies on non-fiscal aspects of an agency's programs, services, or projects compiled by agency personnel, 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	3	R	ARCHIVES NOTE: For agencies that have had an archival appraisal, separate this records series by each type of archival coding, A, R, or E. SEE page ix for more information.		

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1.1.068	36	Reports on Performance Measures Quarterly and annual reports on agency performance measures submitted to executive and legislative offices.	AC + 6		AC + 6		AC = September 1 of odd-numbered calendar years.		
1.1.069	37	Reports - Activity Reports compiled by agency personnel on a daily or other periodic basis pertaining to workload monitoring, task completion times, number of public contacts, and similar activities.	1		1		CAUTION: SEE item number 1.1.064.		
1.1.070	38	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.	AC + 3		AC + 3	R	AC = Completion or termination of program, rules, policies, or procedures. SEE ALSO Agency Rules, Policies and Procedures - Working Files, 1.1.071.		

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1.1.071	39	Agency Rules, Policies, and Procedures - Working Files Working files used in the development of manuals, guidelines, administrative rules, or similar records distributed internally for the use of employees or externally to the public or those individuals or entities regulated by an agency that sets out the rules, policies, and procedures that govern an agency's programs, services, or projects.	AC + 3		AC + 3	R	AC = Completion or termination of program, rules, policies, or procedures. SEE ALSO Records Series Item Number 1.1.070.	
1.1.072	40	Public Information Reports Reports made to the Office of the Attorney General on an agency's Public Information Act activities.	2		2			
1.1.073	41	Administrative Hearings Transcripts and final decisions of hearings conducted as part of the regulatory process, and hearings on proposed rules and changes. The records may be maintained with related information including meeting notices, proofs of publication, and meeting minutes.	AC + 3		AC + 3	R	AC = Last action.	
1.1.074	42	Sunset Review Report and Documentation	AC + 3		AC + 3	R	AC = After the subsequent Sunset Review.	

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



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SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code	809	3. Agency Name State Preservation Board						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total			

1.1.075	43	Alternative Dispute Resolutions - Final Agreement Final agreement described by Government Code 2009.054(c), associated with a matter conducted under an alternative dispute resolution procedure in which personnel of a state agency participated as a party on the agency's behalf.	AC + 4		AC + 4		AC = Date of final agreement. Texas Civil Practice and Remedies Code , Chapter 154.071.	
1.2.001	44	Destruction Authorizations Agency level documents authorizing final disposition of records under a certified records retention schedule.	FE + 3		FE + 3			
1.2.003	45	Forms History File Print masters of original version and all subsequent revisions to an agency form, including any associated design or design modification requests.	AC + 1		AC + 1		AC = Discontinuance of use of form.	
1.2.004	46	Forms Inventory Any periodic listing of all forms used internally or externally by an agency.	US		US			

Retention Codes (Field 7)	Archival Codes (Field 8)
AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	A – Transfer to State Archives R – Review by State Archivist
CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months
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2. Agency Code 809		3. Agency Name State Preservation Board							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total	9. Remarks			

1.2.005	47	Records Retention Schedule (SLR 105) Agency copy. Formerly RMD 105. Includes documentation of certification and approval - forms SLR 105C (formerly RMD 105C), and/or other forms designated by the State Records Administrator.	US	US	Original is retained by the State and Local Records Management Division, Texas State Library and Archives Commission.		
1.2.006	48	Records Transmittal Forms Agency copy (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 + 2	AC = Date of authorization for destruction, permanent transfer from storage, or transfer to the Archives and Information Services Division, Texas State Library and Archives Commission, by the agency records management officer.		
1.2.008	49	Request for Authority to Dispose of State Records (RMD 102) Agency copy.	FE + 3	FE + 3	Original is retained by the State and Local Records Management Division, Texas State Library and Archives Commission.		
1.2.010	50	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	10			

Retention Codes (Field 7)	Archival Codes (Field 8)
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CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months
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Form SLR 105C must accompany this form.

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2. Agency Code 809		3. Agency Name State Preservation Board							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total	9. Remarks			

1.2.011	51	Record Center Storage Approval Forms (RMD 106) Agency copy.	US		US			
1.2.012	52	Records Inventory Worksheets	US		US			
1.2.013	53	Records Control Locator Aids Includes indexes, card files, shelf lists, registers, guides, etc.	AC		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.	
1.2.014	54	Records Management Plans Records management plans and similar records that establish the policies and procedures under which records and information are managed in an agency.	US + 1		US + 1			
1.2.015	55	Disaster Recovery Service Transmittals (RMD 109) Also includes documentation for disaster recovery services provided by other entities.	FE + 1		FE + 1			
1.2.016	56	Disaster Recovery Service Approval Form (RMD 113) Agency copy of form.	AC		AC		AC = Until superseded or termination of service.	

Retention Codes (Field 7)	Archival Codes (Field 8)
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CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months
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Form SLR 105C must accompany this form.

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2. Agency Code 809		3. Agency Name State Preservation Board							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total	9. Remarks			

1.3.001	57	<p>State Publications</p> <p>One copy of each state publication as defined on page xi of this schedule, except a publication that is subject to a different retention period in this schedule. For example, a meeting agenda (see item number 1.1.058) also meets the definition, but it must be retained permanently; item numbers 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.</p>	AC + 2		AC + 2	<p>AC = Until superseded or obsolete.</p> <p>CAUTION: Many state publications must be submitted to the Texas State Publications Depository Program, Texas State Library and Archives Commission, by law (Government Code 441.101-441.106). The Texas State Library and Archives Commission will retain a copy of all state publications submitted to it on a continuing basis, subject to periodic evaluation to determine if the publication merits further retention.</p> <p>For additional information and requirements concerning state publications made available to the public through the Internet, consult the administrative rules of the Texas State Publications Depository Program of the Texas State Library and Archives Commission (13 TAC §§3.1-3.16).</p>		
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Retention Codes (Field 7)				Archival Codes (Field 8)	
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives	
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist	



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

1.3.002	58	Publication Development Files Background material, copy (drafts), original artwork, photo negatives, prints, flats, etc. This includes all work performed both inside and outside the agency.	AV		AV	R		
2.1.001	59	Processing Files Machine-readable files used in the creation, utilization, and updating of master files.	AC		AC		AC = Completion of 3rd verification cycle, or audit completion confirming successful transaction processing, or required audit trail maintenance, or the ability to restore or migrate when errors are detected or when hardware or software changes occur. CAUTION: Records management officers must be certain before assigning the retention period of AC to agency automated processing files that the files do not fall under records series listed elsewhere.	

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



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

2.1.002	60	Master Files Relatively long-lived computer files containing organized and consistent sets of complete and accurate electronic records. Examples include, but are not limited to, data tables of relational databases used by applications or computer programs.	AC		AC	AC = Completion of 3rd verification cycle, or audit completion confirming successful transaction updates, or required audit trail maintenance, or the ability to restore or migrate when errors are detected or when hardware or software changes occur. CAUTION: Records management officers must be certain before assigning the retention period of AC to agency automated processing files that the files do not fall under records series listed elsewhere.		
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Retention Codes (<i>Field 7</i>)				Archival Codes (<i>Field 8</i>)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist			



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

2.1.007	61	Software Programs Automated software applications and operating system files including job control language, program listing/source code, etc.	AC		AC	AC = Until electronic records are transferred to and made usable in a new software environment or there are no electronic records being retained to meet an approved retention period that require the software to be retrieved and read. 13 TAC 6.94. CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.		
2.1.008	62	Hardware Documentation Records documenting operational and maintenance requirements of computer hardware such as operating manuals, hardware/operating system requirements, hardware configurations, and equipment control systems.	AC		AC	AC = Until electronic records are transferred to and made usable in a new hardware environment or there are no electronic records being retained to meet an approved retention period that require the hardware to be retrieved and read. 13 TAC 6.94. CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.		

Retention Codes (Field 7)				Archival Codes (Field 8)	
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives	
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			Agency	Storage	Total	9. Remarks			

2.1.009	63	<p>Technical Documentation</p> <p>Records adequate to specify all technical characteristics necessary for reading or processing of electronic records and their timely, authorized disposition including documentation describing how a system operates and necessary for using the system such as user guides, system or sub-system definitions, system specifications, input and output specifications, and system flow charts; program descriptions and documentation such as program flowcharts, program maintenance logs, change notices, and other records that document modifications to computer programs; and data documentation necessary to access, retrieve, manipulate, and interpret data in an automated system such as a data element dictionary, file layout, code book or table, and other records that explain the meaning, purpose, structure, logical relationships, and origin of the data elements.</p>	AC		AC		<p>AC = Until electronic records are transferred to and made usable in a new hardware or software environment with new documentation or there are no electronic records being retained to meet an approved retention period that require the documentation to be retrieved and read. 13 TAC 6.94.</p> <p>CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.</p>		
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Retention Codes (Field 7)				Archival Codes (Field 8)	
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives	
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2. Agency Code 809		3. Agency Name State Preservation Board							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total	9. Remarks			

2.1.010	64	Audit Trail Records Files needed for electronic data audits such as files or reports showing transactions accepted, rejected, suspended, and/or processed; history files/tapes; records of on-line updates to application files or security logs.	AC		AC		AC = All audit requirements have been met.		
2.1.011	65	Finding Aids, Indexes, and Tracking Systems Automated indexes, lists, registers, and other finding aids used to provide access to records.	AC		AC		AC = The related records have been destroyed. CAUTION: These records must carry the same retention period and archival code of the records they support.		
2.2.001	66	System Monitoring Records Electronic files or automated logs created to monitor computer systems such as print spool logs, console logs, tape activity logs, etc.	AV		AV				

Retention Codes (Field 7)				Archival Codes (Field 8)			
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2. Agency Code	809	3. Agency Name	State Preservation Board					
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4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

2.2.002	67	Chargeback Records to Data Processing Services Users Records used to document, calculate costs, and bill program units for computer usage and data processing services. These records are also used for cost recovery, budgeting, or administrative purposes.	FE + 3		FE + 3				
2.2.004	68	Computer Job Schedules and Reports Schedules or similar records showing computer jobs to be run and other reports by computer operators or programmers of work performed.	3 MO		3 MO				
2.2.010	69	Data Processing Policies and Procedures Manuals, guidelines, or similar documents establishing data processing policies and procedures in an agency in such areas as access and security, systems development, data retention and disposition, data ownership, production control, system back-up, etc.	US + 3		US + 3		CAUTION: Does not include technical documentation of procedures necessary for reading or processing of electronic records. SEE item number 2.1.009.		
2.2.011	70	Batch Data Entry Control Records Forms and logs used to reconcile batches submitted for processing against batches received and processed.	AC		AC		AC = When reconciliation confirmed.		

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



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			Agency	Storage	Total	9. Remarks			

2.2.012	71	Output Records for Computer Production Reports showing transactions that were accepted, rejected, suspended, and/or processed.	AV		AV				
2.2.013	72	Quality Assurance Records Information verifying the quality of system, hardware, or software operations including records of errors or failures and the loss of data resulting from such failures, documentation of abnormal termination and of error free processing, checks of changes put into production, transaction histories, and other records needed as an audit trail to evaluate data accuracy.	AC		AC		AC = No longer needed as an audit trail for any records modified.		
2.2.014	73	Internet Cookies Data resident on hard drives that make use of user-specific information transmitted by the Web server onto the user's computer so that the information might be available for later access by itself or other servers.	AV		AV		The disposal of Internet cookies need not be documented through destruction authorizations (1.2.001) or in records disposition logs (1.2.010), but agencies should establish procedures governing disposal of these records as part of its records management plan (1.2.014).		

Retention Codes (Field 7)	Archival Codes (Field 8)
AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	A – Transfer to State Archives R – Review by State Archivist
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			Agency	Storage	Total				

2.2.015	74	History Files - Web Sites A record of the documents visited during an Internet session that allows users to access previously visited pages more quickly or to generate a record of usage of a state-owned computer.	AV		AV	The disposal of history files need not be documented through destruction authorizations (1.2.001) or in records disposition logs (1.2.010), but agencies should establish procedures governing disposal of these records as part of its records management plan (1.2.014).		
2.2.016	75	Software Registrations, Warranties and License Agreements	LA + 3		LA + 3			
3.1.001	76	Applications for Employment - Not Hired Applications, resumes, transcripts, letters of reference, and similar documents whose submission by candidates for vacant positions is required on the application form, by application procedures, or in the employment advertisement.	2		2	29 CFR 1602.31.		
3.1.002	77	Applications for Employment - Hired Applications, resumes, transcripts, letters of reference, and similar documents whose submission by candidates for vacant positions is required on the application form, by application procedures, or in the employment advertisement.	AC + 5		AC + 5	AC = Termination of employment.		

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

3.1.006	78	Employee Counseling Records Notes, memoranda, or reports relating to the counseling of an employee for work-related, personal, or substance abuse problems. Usually maintained at the supervisory level except in those agencies with counseling staff.	AC + 3		AC + 3	AC = Termination of counseling.		
3.1.011	79	Employee Insurance Records Agency copies of information relating to the selection by employees of life, disability, health, and other types of insurance offered by the State of Texas to its employees.	AC		AC	AC = Until superseded or termination of employment. CAUTION: Documents that serve as payroll deduction authorizations must be maintained for the retention period prescribed for item number 3.2.001.		
3.1.012	80	Employment Opportunity Announcements Internal or external announcements or advertisements of job openings, promotions, training programs, or opportunities for overtime.	2		2	29 CFR 1602.31.		
3.1.013	81	Employment Contracts	AC + 4		AC + 4	AC = Expiration or termination of the contract according to its terms.		

Retention Codes (Field 7)	Archival Codes (Field 8)
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			Agency	Storage	Total				
3.1.014	82	Employment Selection Records Includes notes of interviews with candidates, questions asked of applicants, audio and videotapes of job interviews, driving record and previous injury checks, pre-employment physical examinations, pre-employment drug screening test results, polygraph examination results; and all other records that document the selection process.	2		2		29 CFR 1602.31. CAUTION: Does not include criminal history checks. SEE item number 3.1.026.		
3.1.018	83	Grievance Records Records relating to the review of employee grievances against personnel policies, working conditions, etc.	AC + 2		AC + 2		AC = Final decision on the grievance. CAUTION: Does not include formal complaints filed by an agency employee with the Equal Employment Office (EEO) of the U. S. Department of Labor. SEE item number 1.1.048.		
3.1.019	84	Performance Appraisals	2		2		29 CFR 1620.32(c).		

Retention Codes (Field 7)						Archival Codes (Field 8)	
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			Agency	Storage	Total	9. Remarks			

3.1.020	85	Personnel Corrective Action Documentation Corrective actions are those actions which do not affect pay, status, or tenure and are imposed to correct or improve an employee's job performance.	AC + 5		AC + 5	AC = Termination of corrective action. CAUTION: If, during the retention period of this records series, any part of this series is used to document and support personnel disciplinary action under item number 3.1.021, all documentation from this series used to support disciplinary action must be retained for the the minimum retention period described by item number 3.1.021.		
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Retention Codes (Field 7)				Archival Codes (Field 8)	
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives	
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			Agency	Storage	Total	9. Remarks			

3.1.021	86	<p>Personnel Disciplinary Action Documentation</p> <p>Disciplinary actions are those actions which may affect pay, status, or tenure. They are imposed to discipline an employee whose conduct is harmful to the best interests of the state, the agency, or the employee work force; and for failure to improve performance or conduct following imposition of corrective action. May include cause for demotion, suspension, or dismissal, and the reasons for failure to give written notice of resignation. May also be used to document evidence of employee self-improvement efforts, as well as favorable and unfavorable communication.</p>	AC + 5		AC + 5		AC = Termination of employment.		
3.1.022	87	<p>Personnel Information or Action Forms</p> <p>Forms or similar records used to create or change information concerning the records of an employee including pay grade, position classification, employee number, evaluation date, and termination of employment.</p>	2		2		29 CFR 1602.31.		

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

3.1.023	88	Position/Job Descriptions Job descriptions, including all associated task or skill statements, for positions in an agency.	AC + 4		AC + 4	AC = Until superseded or job eliminated. 40 TAC 815.106(i).		
3.1.024	89	Physical Examinations/Medical Reports Medical or physical examination reports or certificates of employees for whom periodic monitoring of health or fitness is required.	AC + 2		AC + 2	AC = Until superseded or termination of employment. CAUTION: Does not include pre-employment physical examinations. SEE item number 3.1.014.		
3.1.026	90	Criminal History Checks Criminal history record information on job applicants or agency employees obtained from the Department of Public Safety (DPS).	AC		AC	AC = The criminal history record has served the immediate purpose for which it was obtained. CAUTION: An agency that is authorized to obtain a criminal history record information from DPS must refer to its agency's legislation or see Subchapter F, Chapter 411, Government Code for appropriate retention and use of this information.		

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

3.1.027	91	Training and Educational Achievement Records (Individual) Certificates of completion, transcripts, test scores, or similar records documenting the training, testing, or continuing education achievements of an employee.	AC + 5		AC + 5	AC = Termination of employment.		
3.1.029	92	Employment Eligibility, Documentation or Verification of Federal reporting form (INS I-9).	AC + 1		AC + 1	AC = Termination of employment. CAUTION: Federal regulation requires that INS 1-9 forms be retained for 3 years from date of hire or 1 year after separation of the employee, whichever later. Agencies should make certain that the INS I-9 forms for employees who terminate from an agency less than 3 years from date of hire are kept for the 3 year retention period. 8 CFR 274a.2(b)(2)(i)(A) and (c)(2).		

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



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2. Agency Code	809	3. Agency Name State Preservation Board						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total	9. Remarks		

3.1.031	93	Employee Benefits - Other than Insurance Agency copies of information relating to the selection of available benefit options other than insurance.	AC + 2		AC + 2	AC = Until superseded or termination of employment CAUTION: Documents that serve as payroll deduction authorizations must be maintained for the retention period prescribed for item number 3.2.001.		
3.1.034	94	Resumes - Unsolicited Retention period applies if an agency replies to the sender of a resume that it will be kept on file should future job openings occur.	AV		AV	SEE item number 3.1.014 for resumes, whether solicited or unsolicited, that are used in any way in the employment selection process.		
3.1.035	95	Performance Bonds Bonds posted by employees and individuals or entities under contract with an agency for the performance of the duties of a position or the terms of a contract with the agency.	AC + 4		AC + 4	AC = Expiration or termination of the bond according to its terms. CAUTION: Does not include construction or architectural surety bonds. SEE item number 5.2.028.		

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

3.1.036	96	Apprenticeship Records Summary of applicant qualifications, evaluation basis for selection or rejection, original applications, job assignments, promotions, separations, layoffs, terminations, compensation records, conditions of work, time records, hours of training provided (separate from labor), minority status, and gender of all selected and rejected applicants.	5	5	29 CFR 30.8(e).		
3.1.037	97	Employee Recognition Records Awards, incentives, tenure, etc.	AC + 5	AC + 5	AC = Termination of employment.		
3.1.038	98	Public Access Option Form Form completed and signed by employee or official, or former employee or official, electing to keep home address, home telephone number, social security number, and family information open or confidential under the Public Information Act, Government Code §552.024.	US	US	SEE item number 3.3.011.		

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

3.1.039	99	Ombudsman Records Consultation records, notes, letters, memos, emails, reports and other documentation.	AC		AC	AC = Final decision or matter closed. CAUTION: Does not include formal complaint filed with EEO. If matter becomes a grievance or the subject of counseling or litigation, or employee is subject to disciplinary action, the records are subject to retention in the appropriate records series. SEE 1.1.048, 3.1.006, 3.1.018, 3.1.020, and 3.1.021.		
3.2.001	100	Employee Deduction Authorizations Documentation used to start, modify, or stop all voluntary or required deductions from payroll, including garnishment or other court-ordered attachments.	AC + 4		AC + 4	AC = After termination of employee or after amendment, expiration, or termination of authorization, whichever sooner.		
3.2.002	101	Employee Earnings Records	4		4	40 TAC 815.106(i).		
3.2.003	102	Federal Tax Records Includes 1099, W2, FICA, and other tax records.	AC	4	AC + 4	AC = Tax due date, date the claim is filed, or date tax is paid whichever is later. 26 CFR 31.6001 - 1(e)(2).	94-809-006	

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



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			Agency	Storage	Total			

3.2.004	103	Income Adjustment Authorizations Used to make increases or decreases to employees' gross pay, FICA, retirement, or in the computation of taxes.	2		2	29 CFR 516.6(c).		
3.2.005	104	W-4 Forms Employer's copy of "Employees' Withholding Exemption Certificate."	AC + 4		AC + 4	AC = Until superseded, obsolete, or upon separation of employee. 26 CFR 31.6001-1 (e)(2).		
3.2.006	105	Wage Rate Tables	2		2	29 CFR 516.6(a)(2).		
3.2.007	106	Unemployment Compensation Records	AC + 5		AC + 5			
3.2.008	107	Direct Deposit Application/Authorizations	US		US			
3.2.009	108	State Deferred Compensation Records	AC + 5		AC + 5	AC = All accounts with a vendor or vendors for the individual participant have been closed. For instructions regarding the determination of the closure of accounts and for additional information regarding the retention period see the most current edition of the <i>Benefits Coordinator Reference Manual</i> issued by the Employees Retirement System of Texas.		
3.2.010	109	Human Resources Information System (HRIS) Reports Includes supporting documentation.	AC + 4		AC + 4			

Retention Codes (Field 7)				Archival Codes (Field 8)			
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			Agency	Storage	Total	9. Remarks			

3.3.001	110	Affirmative Action Plans Affirmative action plans for both regular employees and apprenticeship programs.	5		5		29 CFR 30.8(e) for apprenticeship plans.		
3.3.004	111	Benefit Plans Employee benefit plans such as pension; life, health, and disability insurance; deferred compensation; etc., including amendments.	US + 1		US + 1		29 CFR 1627.3(b)(2).		
3.3.010	112	Labor Statistics Reports Reports providing statistical information on labor force.	3		3				
3.3.011	113	Former Employee Verification Records Minimum information needed to verify employment, includes name, social security number, exact dates of employment, last known address and most recent public access option form.	AC + 75		AC + 75		AC = Termination of employment. See itemnumber 3.1.038.		
3.3.015	114	Positions/Job Classification Review File Records relating to review and monitoring of job classifications within an agency.	US + 3		US + 3				
3.3.020	115	Work Schedules/Assignments Work, duty, shift, crew, or case schedules, rosters, or assignments.	1		1				

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



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			Agency	Storage	Total			

3.3.022	116	Texas Workforce Commission (TWC) Reports Reports to the agency from TWC or its predecessor pertaining to employees.	3		3			
3.3.023	117	Reimbursable Activities, Requests and Authorizations to Engage in Requests and authorizations for travel; participation in educational programs, workshops, or college classes; or for other work-related activities for which the expenses of the employee are defrayed or reimbursed.	FE + 3		FE + 3			
3.3.024	118	Personnel Policies and Procedures Any internally distributed manuals, guidelines, or similar records that define agency wide policies and procedures concerning the personnel of an agency.	US + 3		US + 3			
3.3.025	119	Job Procedure Records Any documents detailing the procedural duties and responsibilities of agency positions on a position-by-position basis.	US + 3		US + 3			

Retention Codes (<i>Field 7</i>)	Archival Codes (<i>Field 8</i>)
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LA – Life of Asset MO – Months	



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			Agency	Storage	Total	9. Remarks			

3.3.026	120	Agency Staffing Reports Any reports compiled by an agency on aspects of personnel staffing, including listings of all staff by program or name, staff hired during a month, detailed listings of employees within its organizational structure, position vacancies, analyses of turnover rates and seasonality of employment, etc.	US + 3	US + 3				
3.3.027	121	Aptitude and Skills Tests Aptitude or skills tests required of job applicants or of current personnel to qualify for promotion or transfer.	US + 2	US + 2		29 CFR 1602.31.	CAUTION: One copy of each different test (different in terms of either questions or administration procedures) should be retained for the period indicated.	
3.3.028	123	Aptitude and Skills Tests (Test Papers) Aptitude and skills test papers of job applicants or of current personnel taking a test to qualify for promotion or transfer.	2	2		29 CFR 1602.31.		
3.3.029	124	Aptitude and Skills Tests (Validation Records) Records of the validation of aptitude and skills tests.	AC + 2 years	AC + 2 years		AC = As long as the test is used by an agency. 29 CFR 1602.31.		

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

3.3.030	125	Training Administration Records Instructional materials and other records associated with in-house training of agency personnel on personnel policies and procedures and other policies and procedures that govern an agency's programs, services, or projects.	US + 2		US + 2		CAUTION: Does not include hazardous material training records. SEE item number 5.4.007.		
3.3.031	126	EEO Reports and Supporting Documentation Includes documentation used to complete EEO reports.	3		3		29 CFR 1602.32, 1602.39, 1602.41, 1602.48, and 1602.50.		
3.3.032	127	Equal Pay Records Reports, studies, aggregated or summary data, and similar documentation compiled to monitor and demonstrate compliance with the federal Equal Pay Act.	3		3		29 CFR 1620.32.		
3.4.001	128	Accumulated Leave Adjustment Requests Used to create employee leave balances, to transfer leave balances when an employee transfers positions, to adjust carry-over balances on August 31, to correct errors on leave accumulation, and to close out leave accounts on separated employees.	FE + 3		FE + 3				

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



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			Agency	Storage	Total	9. Remarks			

3.4.002	129	Leave Status Reports Cumulative report is issued each pay cycle and provides employee leave status information for each position.	FE + 3		FE + 3				
3.4.003	130	Less Than Full-Time Worked Reports Dates and hours.	4		4		40 TAC 815.106(i).		
3.4.004	131	Overtime Authorizations	2		2				
3.4.005	132	Overtime Schedules	2		2				
3.4.006	133	Time Cards and Time Sheets	1	3	4		40 TAC 815.106(i).	03-809-010	
3.4.007	134	Time Off and/or Sick Leave Requests	FE + 3		FE + 3				
3.4.008	135	Sick Leave Pool Documentation Requests submitted, approvals, number of hours transferred in and out, etc.	FE + 3		FE + 3				
4.1.001	136	Accounts Payable Information	FE + 3		FE + 3				
4.1.002	137	Billing Detail	FE + 3		FE + 3		CAUTION: Does not include long distance telephone billing detail. SEE item numbers 5.5.001, 5.5.006, and 5.5.007.		
4.1.003	138	Canceled Checks/Stubs/Warrants/Drafts	FE + 3		FE + 3				
4.1.004	139	Encumbrance Detail	FE + 3		FE + 3				
4.1.005	140	Inventory and Other Cost Files Production, job, labor, quotes, pricing, specifications, etc.	FE + 3		FE + 3				
4.1.006	141	Investment Transaction Files	FE + 3		FE + 3				

Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
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4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total	9. Remarks			

4.1.007	142	Transfers or Budget Revisions Transfers or adjustment to budgets.	FE + 3		FE + 3			
4.1.008	143	Electronic Fund Transfers Direct Deposit Registers.	FE + 3		FE + 3			
4.2.001	144	Cash Deposit Vouchers Cash deposit slips.	FE + 1	2	FE + 3		03-809-012	
4.2.002	145	Cash Receipts Includes receipts for fees (permits, licenses, renewals, etc.).	FE + 3		FE + 3			
4.2.003	146	Daily Cash Receipts Logs	FE + 3		FE + 3			
4.2.004	147	Encumbrance Vouchers Orders, statements, change orders, etc.	FE + 3		FE + 3			
4.2.005	148	Purchase Vouchers Requisitions, orders, receiving reports, invoices, or statements, change orders, best value determinations, etc.	FE	3	FE + 3		94-809-009	
4.2.006	149	General Journal Vouchers	FE + 3		FE + 3			
4.2.007	150	Expenditure Vouchers Travel, payroll, etc.	FE + 3		FE + 3			
4.3.001	151	Sales Journals or Registers	FE + 3		FE + 3			
4.3.002	152	Receipts Journals or Registers	FE + 3		FE + 3			
4.3.003	153	Expenditures Journals or Registers	FE + 3		FE + 3			
4.4.001	154	General and Subsidiary Ledgers	FE + 3		FE + 3			
4.4.002	155	Accounts Receivable Ledgers	FE + 3		FE + 3			

Retention Codes (Field 7)

AC – After Closed, Terminated, Completed, Expired, Settled
AV – Administrative Value

CE – Calendar Year End
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MO – Months

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US – Until Superseded

Archival Codes (Field 8)

A – Transfer to State Archives
R – Review by State Archivist



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2. Agency Code		3. Agency Name							10.		11.
809		State Preservation Board							106 No.		TSLAC ONLY Amend. No.
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.		
			Agency	Storage	Total						
4.4.003	156	Accounts Payable Ledgers	FE + 3		FE + 3						
4.4.004	157	Employee Savings Bond Ledgers	FE + 3		FE + 3						
4.5.001	158	Worksheets for Preparing Fiscal Reports	FE + 3		FE + 3						
4.5.002	159	Internal Fiscal Management Reports Includes agency monthly budget reports.	FE + 3		FE + 3						
4.5.003	160	Annual Financial Reports Required by the General Appropriations Act (100 Day Report).	AC + 6		AC + 6		AC = September 1 of odd-numbered calendar years. CAUTION: If an agency does not produce a biennial or annual narrative report as described in item number 1.1.066, then these annual financial reports must be marked with Archival Code A. The archival requirement, when a biennial or annual narrative report is not produced, is met by sending the required copies of the reports to the Texas State Publications Depository Program, Texas State Library and Archives Commission.				
4.5.005	161	External Fiscal Reports Special purpose - i.e. federal financial reports, salary reports, etc. Includes HUB Reports.	FE + 3		FE + 3						

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Archival Codes (Field 8)

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			Agency	Storage	Total	9. Remarks			

4.5.006	162	Annual Operating Budgets Required by the General Appropriations Act.	FE + 3		FE + 3			
4.5.007	163	USAS Reports – Daily	AC		AC	AC = Receipt and reconciliation of monthly report.		
4.5.008	164	USAS Reports - Monthly	AC		AC	AC = Receipt and reconciliation of annual report.		
4.5.009	165	USAS Reports - Annual	FE + 3		FE + 3			
4.6.001	166	Balancing Records	FE + 3		FE + 3			
4.6.002	167	Reconciliations	FE + 3		FE + 3			
4.6.003	168	Cash Counts	FE + 3		FE + 3			
4.7.001	169	Accounting Policies and Procedures Manual	US + 3		US + 3			
4.7.002	170	Bank Statements	FE + 3		FE + 3			
4.7.003	171	Returned Checks/Warrants/Drafts (Uncollectable)	AC + 3		AC + 3	AC = After deemed uncollectable.		
4.7.004	172	Capital Asset Records	LA +3		LA +3			
4.7.005	173	Claim Files	AC + 3		AC + 3	AC = Resolution of claim.		
4.7.006	174	Comptroller Statements	FE + 3		FE + 3			
4.7.007	175	Detail Chart of Accounts One for all accounts in use for a fiscal year.	FE + 3		FE + 3			

Retention Codes (Field 7)	Archival Codes (Field 8)
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4.7.008	176	Federal Grant Records	AC + 3		AC + 3	AC = Satisfaction of all Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments (the Common Rule). CAUTION: Retention requirements may vary depending on the specific federal funding agency. Agencies must ensure that records are retained for the appropriate retention period.		
4.7.009	177	Fixed Asset Sequential Number Logs	US + 3		US + 3			
4.7.010	178	Long-Term Liability Records Bonds, etc.	AC + 3		AC + 3	AC = Retirement of debt.		
4.7.011	179	Texas Building and Procurement Commission Statements (TBPC) Charge or bill statements received by agencies from the TBPC for services provided.	FE + 3		FE + 3			
4.7.012	180	Signature Authorizations Signature cards or similar records establishing authority of an agency employee to initiate or authorize financial transactions on behalf of an agency.	US + FE + 3		US + FE + 3			

Retention Codes (Field 7)	Archival Codes (Field 8)
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5.1.001	181	Contracts and Leases Contracts, leases, and agreements include general obligation, land lease, utilities, and construction except for buildings. Documents include specifications, affidavits of publication of calls for bids, accepted bids, performance bonds, contracts, purchase orders, inspection reports, and correspondence.	AC + 4		AC + 4		AC = Expiration or termination of the instrument according to its terms. SEE item number 5.2.028 for building construction contracts and item number 5.1.017 for contract logs.	
5.1.003	182	Delivery Reports	2		2			
5.1.004	183	Mail and Telecommunications Listings Any mailing address, telephone or fax number, or e-mail address records maintained by an agency on its employees or on entities or persons it serves.	US		US			
5.1.005	184	Postage Records Records and reports of postage expenses, including postal meter usage.	FE + 3		FE + 3			
5.1.007	185	Requisitions for In-Agency or Inter-Agency Copy/Printing Service Includes word processing and data processing.	AV		AV			

Retention Codes (Field 7)	Archival Codes (Field 8)
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5.1.010	186	Licenses and Permits for Non-vehicles Does not include licenses and permits issued by an agency as part of its statutory responsibilities.	AC + 2		AC + 2	AC = Expiration date of license or permit.		
5.1.011	187	Photocopier and Telefax Usage Logs & Reports	AV		AV			
5.1.012	188	Charge Schedules/Price Lists Schedules of prices charged by an agency for services to the public or other agencies, including any documentation used to determine the charges.	US + 3		US + 3			
5.1.013	189	Insurance Policies For vehicles, equipment, etc.	AC + 4		AC + 4	AC = Expiration or termination of the policy according to its terms.		
5.1.014	190	Office Procedures Any internally distributed manual, guidelines, or similar records that establish standard office procedures for an agency; for example, agency style manuals, telephone protocols, mail room procedures, print shop and photocopy ordering instructions.	US + 1		US + 1			

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



STATE OF TEXAS
Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 809		3. Agency Name State Preservation Board							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total	9. Remarks			

5.1.015	191	Correspondence Tracking Records Any record created by an agency to track any type of incoming and outgoing correspondence or packages by the U.S. Postal Service or by private couriers.	1	1				
5.1.017	192	Contract Log List of agency contracts, leases, and agreements including general obligation, land lease, utilities, and construction contracts.	FE + 3	FE + 3				
5.2.001	193	Appraisals - Building or Property	AV	AV	R			
5.2.002	194	Building Construction Project Files Planning, design, and construction records; accepted and rejected bids; correspondence; etc.	AC + 10	AC + 10	R	AC = Completion of project. SEE ALSO item numbers 5.2.003 and 5.2.028.		
5.2.003	195	Building Plans and Specifications Includes architectural and engineering drawings, profiles, and blueprints.	State owned: LA Leased: AC+2	State owned: LA Leased: AC+2	R (state owned only)	AC: For leased buildings, AC = Termination or cancellation of lease. SEE ALSO item numbers 5.2.002 and 5.2.028. ARCHIVES NOTE: Archival review designation is for state-owned buildings only.		

Retention Codes (Field 7)	Archival Codes (Field 8)
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2. Agency Code 809		3. Agency Name State Preservation Board							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.
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5.2.004	196	Building Space Requests	1		1			
5.2.005	197	Calibration Records (Equipment or Instrument)	10		10			
5.2.006	198	Property Destruction, Certificates of	FE + 3		FE + 3			
5.2.007	199	Damage Reports Reports of damage to state property.	FE + 3		FE + 3			
5.2.008	200	Equipment History File; Equipment Service Agreements Agreements or contracts between the agency and equipment vendor to provide maintenance service for equipment. Includes requests for installation, moves, service, etc.; and service/repair logbooks, etc.	LA + 3		LA + 3			
5.2.009	201	Equipment Inventory Detail Report Forms Updates agency portion of the inventory listing and adds, changes, transfers, or deletes items from inventory.	FE + 3		FE + 3			
5.2.010	202	Equipment Manuals	LA		LA			
5.2.011	203	Equipment Warranties	AC + 1		AC + 1		AC = Expiration of Warranty.	
5.2.012	204	Estimate Files (Supply and Repair Cost Estimates)	1		1			
5.2.014	205	Inventory - Annual Physical Property, equipment, supply verification.	FE + 3		FE + 3			

Retention Codes (Field 7)				Archival Codes (Field 8)	
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5.2.015	206	Inventory, Notices of Equipment Removed From	FE + 3		FE + 3			
5.2.016	207	Inventory System Update Listings Listing shows all additions, changes, deletions, and transfer times for the monthly processing period.	AC		AC		AC = Transfer of information into annual listing.	
5.2.017	208	Lost & Stolen Property Reports	FE + 3		FE + 3			
5.2.018	209	Quality Control Reports	2		2			
5.2.019	210	Service Orders Agency copy of forms completed by mechanical service personnel for installation or repair. Includes billing code, service, labor, parts, and remarks.	1		1			
5.2.020	211	Supply Usage Records	FE + 1		FE + 1			
5.2.021	212	Surplus Property Sale Reports	FE + 3		FE + 3			
5.2.022	213	Utility Usage Reports	AV		AV			
5.2.023	214	Year-to-Date Activity (Inventory Listing) Shows additions, changes, transfers, and deletions of information within the inventory system. Data include agency, division, tag number, batch, document, transaction date, location, item code, description, date, and cost.	FE + 3		FE + 3			
5.2.024	215	Material Specifications	AC + 2		AC + 2		AC = Material is no longer in the agency.	

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

5.2.025	216	Equipment Descriptions and Specifications	AC + 2		AC + 2	AC = Equipment is no longer in the agency.		
5.2.026	217	Facilities Reservation Logs Reservation logs or similar records relating to the use of agency facilities such as meeting rooms, auditoriums, etc.	2		2			
5.2.027	218	Space Utilization Reports	AV		AV			
5.2.028	219	Building Construction Contract and Inspection Records Building construction contracts, surety bonds, and inspection records.	LA + 10		LA + 10 R	SEE ALSO item numbers 5.2.002 and 5.2.003.		
5.3.002	220	Freight Bills Paid	FE + 3		FE + 3			
5.3.003	221	Freight Claims	AC + 2		AC + 2	AC = Resolution of claim.		
5.3.004	222	Order - Acknowledgments	AV		AV			
5.3.005	223	Packing Slips	AV		AV			
5.3.007	224	Bid Documentation Includes bid requisition/authorizations, invitations to bid or propose, bid specifications, accepted and rejected bids, and bid tabulation/evaluations.	FE + 3		FE + 3	CAUTION: If a formal written contract is the result of a successful bid or request for proposal, the successful bid or request for proposal and its supporting documentation must be retained for the same period as the contract. SEE item number 5.1.001 an 5.2.028.		

Retention Codes (Field 7)				Archival Codes (Field 8)			
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			Agency	Storage	Total	9. Remarks			

5.3.008	225	Purchasing Logs Log, register, etc., providing a record of purchase orders issued, orders received, and similar data on procurement status.	FE + 3		FE + 3				
5.3.009	226	Requests for Information Requests for information preliminary to the procurement of goods or services by direct purchase or bid.	AC		AC		AC = Date of direct purchase, issuance of request for bids, or decision not to proceed with the procurement, as applicable.		
5.4.001	227	Accident Reports and Associated Documentation Accident or occupational disease reports (by supervisors and employees) and other associated reports required to be submitted to the Texas Department of Insurance or its predecessors or maintained internally on accident frequency.	CE + 5		CE + 5		29 CFR 1904.33. The Texas Department of Insurance retains copies of the reports submitted to it for 50 years.		
5.4.002	228	Evacuation Plans Plans for evacuation of agency facilities in cases of emergency.	US		US				

Retention Codes (Field 7)	Archival Codes (Field 8)
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			Agency	Storage	Total	9. Remarks		

5.4.003	229	Inspection Records Fire, safety, and other inspection records of agency facilities and equipment.	AC + 3		AC + 3	AC = Inspection, or date of the correction of the deficiency if the inspection report reveals a deficiency. CAUTION: Does not include inspection reports of building construction. SEE item number 5.2.028.		
5.4.004	230	Fire Orders Orders issued by Fire Marshal to correct deficiencies in compliance with the fire code.	AC + 3		AC + 3	AC = Deficiency corrected.		
5.4.007	231	Hazardous Materials Training Records Records of training given employees in an agency hazard communications program.	5		5	Texas Health and Safety Code, 502.009(g).		
5.4.008	232	Hazard Communication Plans	US + 5		US + 5	Texas Health and Safety Code, 502.009(g).		
5.4.009	233	Workplace Chemical Lists	30		30	Texas Health and Safety Code, 502.005(d).		
5.4.010	234	Material Safety Data Sheets	AC		AC	AC = After sheets are updated or hazardous chemical no longer stored by agency, as applicable.		

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

5.4.011	235	Visitor Control Registers Logs, registers, or similar records documenting visitors to limited access or restricted areas of agency facilities.	3		3			
5.4.012	236	Security Access Records Records relating to the issuance of keys, identification cards, building passes, passwords, signed statements or similar instruments of access to agency or state facilities, equipment or automated systems.	AC + 2		AC + 2		AC = Until superseded, date of expiration, or date of termination, whichever sooner.	
5.4.013	237	Disaster Preparedness and Recovery Plans	US		US			
5.5.001	238	Billing Detail - Telecommunications (Other Than TEX-AN) In addition to summary detail, includes any accompanying detailed listing of long distance calls.	FE + 3		FE + 3		SEE item number 5.5.006 for TEX-AN billing detail.	
5.5.002	239	Long Distance Telephone Logs Long distance logs created by agencies for internal documentation purposes. Includes any similar logs created for long distance facsimile or electronic transmissions.	AV		AV			

Retention Codes (Field 7)	Archival Codes (Field 8)
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			Agency	Storage	Total	9. Remarks			

5.5.003	240	Station Activity Reports Internal listing of incoming/outgoing telephone activity to individual telephone stations.	AV		AV			
5.5.004	241	System Activity Reports Internal listing of all incoming/outgoing agency telephone activity.	AV		AV			
5.5.006	242	Billing Detail - Telecommunications (TEX-AN) In addition to summary detail, includes any accompanying detailed listing of long distance calls.	FE + 3		FE + 3		The billing agency will maintain all long distance TEX-AN records and will provide each using agency its bill summary of centralized capitol complex telephone service without call detail records. For these bill summaries, SEE item number 4.7.011. SEE item number 5.5.001 for billing detail from carriers other than TEX-AN.	
5.5.007	243	Disputed Call Documentation Documentation relating to disputed long distance calls, including documents evidencing repayment by employees for personal long distance use.	FE + 3		FE + 3			
5.6.003	244	Inspection Repair and Maintenance Records - Vehicles	LA + 1		LA + 1			

Retention Codes (Field 7)				Archival Codes (Field 8)	
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			Agency	Storage	Total	9. Remarks			

5.6.004	245	License and Driving Record Checks	AC		AC		AC = Until superseded or until termination of employment.		
5.6.005	246	Vehicle Use Reports Includes mileage, fuel/oil consumption, passengers carried and other related operational information.	FE + 3		FE + 3				
5.6.007	247	Vehicle Titles & Registrations	LA		LA				
5.6.009	248	Parking Permits or Assignments	US		US				
	249	Facilities Maintenance	PM		PM	R	Texas Government Code §443.007		
	250	Curatorial, Capitol Historical Project, SPB Historical Reference	PM		PM	A	Texas Government Code §443.007		
	251	Capitol Preservation and Extension Project Files	PM		PM	A	Texas Government Code §443.007		
	252	Capitol Preservation and Extension Project Files	AC	10	AC+10		Duplicates of Agency Item Number 251	92-809-002	
	253	General Land Office Building Restoration Project Files	PM		PM	A	Texas Government Code §443.007		
	254	General Land Office Building Restoration Project Files	5	10	15		Duplicates of Agency Item Number 253	93-809-003	
	255	Capitol Fund Fund-Raising Files	PM		PM	E	Archival Exemption 1/17/97		
	256	Capitol Fund-Donations, Revenues, and Payments	FE	10	FE+10		Texas Government Code §443.007	03-809-013	

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			Agency	Storage	Total				

	257	Asbestos/Hazardous Waste	AC+1	29	AC+30	E	AC = After Complete Archival Exemption 1/17/97	92-809-001	
	258	Historic South Grounds Project Files	PM		PM	A			
	259	Capitol Visitor's Parking Garage Files	PM		PM	R			
	260	Texas State History Museum Project Files	PM		PM	R			
	261	Museum Fund-Donations, Revenues, and Payments	PM		PM		Texas Government Code §443.007		
	262	Capitol Events and Exhibits – Current	3	3	6	A		03-809-011	
4.5.005	263	Capitol Preservation & Extension Construction and General Land Office Building & Grounds Restoration Payment Vouchers	PM		PM	A			
5.1.001	264	Capitol Preservation & Extension Construction and General Land Office Building & Grounds Restoration Contracts	PM		PM	A			
1.1.067	265	Status of the Capitol Collections Annual Report to the Board	PM		PM	A			
5.2.002	266	Capitol General Files	PM		PM	A			
5.2	267	Capitol Grounds Files	PM		PM	A			
5.2	268	Goddess of Liberty Files	PM		PM	A			
1.1	269	Capitol Events and Exhibits – Past	PM		PM	A			
1.1	270	Capitol Furnishings Project	PM		PM	A			

Retention Codes (Field 7)	Archival Codes (Field 8)
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1.1	271	General Land Office Building Correspondence	PM		PM	A		
1.1	272	Education Programs (CVC)	4		4	A		
1.1	273	Exhibits (CVC)	4		4	A		
1.1.025	274	Policies (CVC)	US + 3		US + 3	A		
1.1	275	Special Events (CVC)	4		4	A		
1.1	276	GLO Historical Information	PM		PM	A		
1.1	277	GLO Legislation and Legal Opinions	PM		PM	A		
1.1	278	GLO Reports	PM		PM	A		
1.3.001	279	CVC Publications	PM		PM	A	ARCHIVES NOTE: These publications are sent directly to the State Archives rather than the State Publications Department	

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Archival Codes (Field 8)

A – Transfer to State Archives
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