



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

SLR 105  
Rev. 2017-07

Retention Codes (field 7)

AC – See field 9 for specific records series definition  
 AV – Administratively valuable  
 CE – Calendar year end  
 FE – Fiscal year end  
 LA – Life of Asset  
 PM – Permanent  
 US – Until Superseded

Archival Codes (Field 10)

A/I – Transfer to State/University Archivist  
 R/O – Review by State/University Archivist

1. Agency Code: 750		2. Agency Name: THE UNIVERSITY OF TEXAS AT TYLER									
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				
ATH01		STUDENT-ATHLETE EDUCATION RECORDS	INCLUDING STUDENT-ATHLETE STATEMENT, HIGH SCHOOL AND ALL COLLEGE TRANSCRIPTS, PRECOLLEGE TEST SCORES AND RELATED INFORMATION AND CORRESPONDENCE. RECORDS CONCERNING FINANCIAL AID, OTHER DOCUMENTS OBTAINED PERTAINING TO NCAA ELIGIBILITY	AC	6			AC=Graduation or date of last attendance.		Subject to NCAA Investigative Review.	
ATH02		NCAA [NATIONAL COLLEGIATE ATHLETIC ASSOCIATION] COMPLIANCE RECORD	INCLUDING CERTIFICATION OF COMPLIANCE FORM, STUDENT-ATHLETE STATEMENT, DRUG TESTING CONSENT FORM, STUDENT-ATHLETE AFFIRMATION, INFORMATION AND SPORTS SPONSORSHIP, AND DESIGNATION OF INSTITUTIONAL REPRESENTATIVES		6					Subject to NCAA Compliance.	
ATH05		ASC [AMERICAN SOUTHWEST CONFERENCE] COMPLIANCE RECORDS	(MEDICAL HARDSHIPS AND TRANSFER FORMS).		6						



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ATH06	1.1.019	PUBLIC RELATION RECORDSNEWS, PRESS RELEASES, OR ANY PUBLIC RELATIONS FILES MAINTAINED OR ISSUED BY AN AGENCY	INCLUDES PRINT, ELECTRONIC, AUDIO, AND AUDIOVISUAL RECORDS	PM					O		
ATH07		RULES AND REGULATIONS	INCLUDING NCAA RULES, INTERPRETATION RECORDS AND/ OR FILES AND DOCUMENTATION TO SUBSTANTIATE THE DISSEMINATION AND COMMUNICATION OF RULES AND EDUCATIONAL MATERIAL		6					Subject to NCAA review.	
ATH08		DAILY INJURY REPORT			7						
ATH09	1.1.067	NCAA PROVISIONAL COMPLIANCE REPORTS	(INCLUDING INSTITUTIONAL SELF-STUDY AND THIRD YEAR PROVISIONAL REPORT)	PM					O	Subject to NCAA review.	
ATH10	1.1.067	YEARLY REPORTS	(INCLUDING EQUITY IN ATHLETICS DISCLOSURE ACT, GRADUATION RATES, AND US NEW S AND WORLD REPORT)	PM					O	Subject to NCAA and federal agency review.	
ATH12	4.5.005	EXTERNAL FISCAL REPORTS	(NCAA FINANCIAL AID REPORT)	FE	6						



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ATH13		TEAM ROSTERS AND PHOTOGRAPHS	(INCLUDING PHOTOGRAPHIC DOCUMENTATION OF ATHLETIC EVENTS)	PM					I		
ATH14		MEDICAL RECORDS		AC	7			AC=Graduation date or last attendance. Or, retain until patient reaches age 21, whichever is longer.			
ATH15		RECRUITMENT MATERIALS		AC	5			AC=End of eligibility.			
ATH16	1.1.019	MEDIA GUIDES FOR INDIVIDUAL SPORTS		PM					O		
ATH17		SPORTS STATISTICS		PM							
ATH18		ISSG - INSTITUTIONAL SELF STUDY GUIDE		PM						Part of the permanent membership obligations for NCAA members.	
HPC01		PATRIOT CENTER MEMBER APPLICATIONS		FE	3						
OIA1.1		IPEDS [INTEGRATED POSTSECONDARY EDUCATIONAL DATA SYSTEM] REPORTS		AC	6			AC=End of award year.			



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OSR1.1		SPONSORED GRANTS AND CONTRACTS		AC	7			AC=After expiration of agreement.			
OSR1.2		INDIRECT COST CALCULATIONS		AC	5			AC=After expiration of agreement.			
OSR1.3		TIME AND EFFORT REPORTS		AC	5			AC=After expiration of agreement.			
SBS1.1		RECORDS OF STUDENTS ACCOUNTS	BILLS, PAYMENTS, REFUNDS	AC	5			AC=End of award year.			
SH1.1		ACTIVE FILES - BASIC INFORMATION	(FILES INCLUDE: HOUSING APPLICATION, CORRESPONDENCE, DEPOSIT RECEIPTS, AND ON-CAMPUS HOUSING CONTRACT)	AC	4			AC=After end of lease.			
SH1.2		INACTIVE FILES - BASIC INFORMATION	(FILES INCLUDE: HOUSING APPLICATION ONLY)	AC	1			AC=Date of application			
SH1.3		TRANSFER FILES	(FILES INCLUDE: HOUSING APPLICATION, CORRESPONDENCE, DEPOSIT RECEIPTS, ON-CAMPUS HOUSING CONTRACT, AND CHECKOUT/ROOM CONDITION FORMS)	AC	1			AC=Date of application			
SH1.4		PARKING APPEALS	(TICKETS, APPEAL FORMS, RULINGS)	AC	2			AC=After final disposition.			



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SH2.1		JUDICIAL/DISCIPLINE RETENTION RECORDS	(FILES INCLUDE: INCIDENT REPORTS, CORRESPONDENCE, JUDICIAL MEETING NOTES, SANCTION INFORMATION, WITNESS STATEMENTS, AND EVIDENCE)	AC	7			AC=Date of graduation			
SR9.1.001	1.1.008	ACCEPTANCE LETTERS		AC	3			AC=After application term.		Student that did not enter.	
SR9.1.002		ADVANCED PLACEMENT RECORDS		AC	3			AC=Termination of enrollment.		Student that did not enter.	
SR9.1.003		ADMISSIONS APPLICATIONS	(FERPA APPLIES BUT RECORDS ARE SUBJECT TO OPEN RECORDS LAW)	AC	3			AC=After application term.		Student that did not enter.	
SR9.1.005		ENTRANCE EXAMINATION REPORTS (ACT/CEEB)		AC	3			AC=After application term.		Student that did not enter.	
SR9.1.006		RECOMMENDATION LETTERS		AC	3			AC=After application term.		Student that did not enter.	
SR9.1.007		MEDICAL RECORDS - STUDENT THAT DID NOT ENTER	SUBMITTED TO U.T. TYLER AS PART OF APPLICATION PROCESS AND NOT GENERATED AT THE INSTITUTION	AC	3			AC=After application term.			
SR9.1.008		PLACEMENT TEST SCORES & REPORTS		AC	3			AC=After application term.		Student that did not enter.	
SR9.1.009		READMISSION SCORES		AC	3			AC=After application term.		Student that did not enter.	
SR9.1.010		RECRUITMENT MATERIALS		AC	3			AC=After application term.		Student that did not enter.	



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SR9.1.011		OTHER TEST SCORES		AC	3			AC=After application term.		Student that did not enter.	
SR9.1.012		TRANSCRIPTS - OTHER COLLEGES		AC	3			AC=After application term.		Student that did not enter.	
SR9.1.013		TRANSCRIPTS - HIGH SCHOOLS		AC	3			AC=After application term.		Student that did not enter.	
SR9.1.014		MILITARY DOCUMENTS - STUDENT THAT DID NOT ENTER		AC	3			AC=After application term.			
SR9.1.015		INTERNATIONAL STUDENT IMMIGRATION DOCUMENTATION	IMMIGRATION RECORDS, INCLUDING DOCUMENTS USED FOR ADMISSION OF INTERNATIONAL STUDENTS, MUST BE KEPT THREE YEARS BEYOND THE DATE THE STUDENT IS NO LONGER PURSUING A FULL COURSE OF STUDY OR COMPLETION OF OPT. 8 CFR 214.3(g)	AC	3			AC=After no longer pursuing a full course of study OR end of OPT		At least <b>three years after</b> the student is no longer pursuing a full course of study at UT Tyler <u>or the end of any period of post-completion OPT.</u>	
SR9.1.016		TRANSCRIPTS, TEST SCORES, SUPPORTING DOCUMENTATION OF INDIVIDUALS WHO DO NOT APPLY		AC	1			AC=Receipt		Student that did not enter.	
SR9.2.014		ACCEPTANCE LETTERS		AC	5			AC=Graduation date or last attendance.			



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SR9.2.015		ADVANCED PLACEMENT RECORDS		PM							
SR9.2.016		APPLICATIONS FOR ADMISSIONS AND READMISSIONS		PM							
SR9.2.018		ENTRANCE EXAMINATION REPORTS (ACT/CEEB)		PM							
SR9.2.019		RECOMMENDATION LETTERS		AC				AC=Until admitted.			
SR9.2.020		MEDICAL RECORDS	SUBMITTED TO U.T. TYLER AS PART OF APPLICATION	AC	7			AC=Graduation date or last attendance. Or, retain until patient reaches age 21, whichever is longer.			22 TAC 165.1 (b)
SR9.2.021		PLACEMENT SCORES		AC	5			AC=Graduation date or last attendance.			
SR9.2.022		RECRUITMENT MATERIALS	BROCHURES, VIEWBOOK, COLLEGE PLANNERS, FACTBOOK	AC	2			AC=End of semester distributed.			
SR9.2.023		RESIDENCY CLASSIFICATION FORMS		AC	5			AC=Graduation date or last attendance.			



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SR9.2.024		STUDENTS WAIVERS	FOR RIGHTS OF ACCESS TO LETTERS OF RECOMMENDATION FOR ADMISSION	AC				AC=Date of admission.		FERPA (Family Educational Rights and Privacy Act) states that letters of recommendation not accompanied by waivers and retained beyond their intended use may be viewed by the student. As a consequence, it is recommended that these letters be destroyed after admission of the student. Waivers of rights of access filed with letters of recommendation should be retained as long as the file is retained. Students who revoke their waivers of rights of access may not see letters of recommendation during the time the waivers were in force.	
SR9.2.025		OTHER TEST SCORES		PM							





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SR9.2.026		TRANSCRIPTS - HIGH SCHOOLS		PM							
SR9.2.027		TRANSCRIPTS - OTHER COLLEGES		PM							
SR9.2.028		INTERNATIONAL STUDENT IMMIGRATION DOCUMENTATION	IMMIGRATION RECORDS, INCLUDING DOCUMENTS USED FOR ADMISSION OF INTERNATIONAL STUDENTS, MUST BE KEPT THREE YEARS BEYOND THE DATE THE STUDENT IS NO LONGER PURSING A FULL COURSE OF STUDY OR COMPLETION OF OPT. 8 CFR 214.3(g)	AC	3			AC=After no longer pursuing a full course of study OR end of OPT		At least <b>three years after</b> the student is no longer pursuing a full course of study at UT Tyler <u>or the end of any period of post-completion OPT.</u>	
SR9.2.029		ACADEMIC ACTION AUTHORIZATIONS		AC	5			AC=Graduation date or last attendance for exchange visitor VISAS.			
SR9.2.203		MILITARY DOCUMENTS		PM							
SR9.3.030		ACADEMIC ADVISING DOCUMENTS		AC	5			AC=Graduation date or last attendance.			



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SR9.3.031		ACADEMIC RECORDS NARRATIVE EVALUATIONS, ASSESSMENTS		PM						Although student records created and maintained by medical and dental schools are usually narrative assessments of academic progress or clinical practice, for purposes of this retention schedule, such records are in the same category as the academic record.	
SR9.3.032		ADVANCED PLACEMENT RECORDS		PM						Although student records created and maintained by medical and dental schools are usually narrative assessments of academic progress or clinical practice, for purposes of this retention schedule, such records are in the same category as the academic record.	



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SR9.3.033		APPLICATION FOR GRADUATION		PM						Although student records created and maintained by medical and dental schools are usually narrative assessments of academic progress or clinical practice, for purposes of this retention schedule, such records are in the same category as the academic record.	
SR9.3.034		APPLICATIONS FOR ADMISSIONS AND READMISSIONS		PM						Although student records created and maintained by medical and dental schools are usually narrative assessments of academic progress or clinical practice, for purposes of this retention schedule, such records are in the same category as the academic record.	
SR9.3.035		AUDIT AUTHORIZATIONS-STUDENT RECORDS		AC	5			AC=Graduation date or last attendance.			
SR9.3.036		CHANGES OF COURSE	(ADD/DROP)	AC	5			AC=End of academic term.			



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SR9.3.037		CHANGES OF GRADE FORMS UPDATED DOCUMENTS		PM							
SR9.3.038		CLASS LISTS - ORIGINAL GRADE SHEET		PM							
SR9.3.039		CLASS SCHEDULES STUDENTS CHANGES OF COURSE ADDS/DROPS		AC	5			AC=End of academic term.			
SR9.3.040	1.1.008	CORRESPONDENCE, GENERAL	INCOMING/ OUTGOING LETTERS, TO STUDENTS OR TO UNIVERSITIES - GENERAL INQUIRIES AND REQUESTS)	AC	5			AC=Graduation date or last attendance.			
SR9.3.041		CREDIT BY EXAMINATION FORMS		PM						Although student records created and maintained by medical and dental schools are usually narrative assessments of academic progress or clinical practice, for purposes of this retention schedule, such records are in the same category as the academic record.	



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SR9.3.043		CURRICULUM CHANGE AUTHORIZATION		PM						Although student records created and maintained by medical and dental schools are usually narrative assessments of academic progress or clinical practice, for purposes of this retention schedule, such records are in the same category as the academic record.	
SR9.3.045		DISCIPLINARY ACTION DOCUMENTS	(RESULTING IN A PENALTY OF SUPSPENSION, EXPULSION, DENIAL OR REVOCATION OF A DEGREE, AND/OR WITHDRAWAL OF A DIPLOMA)	PM						See regents rules and reg. part one, chapter VI, section 3.8. The university shall maintain a permanent written disciplinary record for every student assessed a penalty of suspension, expulsion, denial or revocation of a degree, and/or withdrawal of a diploma.	



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SR9.3.045a		DISCIPLINARY ACTION DOCUMENTS	(NOT RESULTING IN A PENALTY OF SUSPENSION, EXPULSION, DENIAL OR REVOCATION OF A DEGREE, AND/OR WITHDRAWAL OF A DIPLOMA)	AC	5			AC=After disciplinary action date.		See regents rules and reg. part one, chapter VI, section 3.8. A record of scholastic violations shall be maintained for at least five years.	
SR9.3.046		FEE ASSESSMENT FORMS		AC	5			AC=Graduation date or last attendance.			



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SR9.3.047		FERPA (FAMILY EDUCATIONAL RIGHTS AND PRIVACY ACT) DOCUMENTS		AC	5			AC=Graduation date or last attendance.		FERPA (Family Education Rights and Privacy Act) specifically requires institutions to maintain records of requests and disclosures of personally identifiable information except for defined "directory information" and requests from students for their own records. The records of disclosures and requests for disclosures are considered part of the students' educational records' therefore, they must be retained as long as the educational records to which they refer are retained by the institution.	
SR9.3.048		FINANCIAL AID DOCUMENTS		AC	5			AC=After annual audit has been accepted by U.S. Dept. of Educ.			
SR9.3.049		FOREIGN STUDENT FORMS		PM							



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SR9.3.051		GRADUATION LISTS		PM							
SR9.3.052		GRADUATION AUTHORIZATIONS		PM							
SR9.3.053		HOLD OR ENCUMBRANCE AUTHORIZATIONS		AC				AC=Until release.			
SR9.3.054		MEDICAL RECORDS		AC	7			AC=Graduation date or last attendance. Or, retain until patient reaches age 21, whichever is longer.			22 TAC 165.1 (b)
SR9.3.055		NAME CHANGE AUTHORIZATIONS		PM							
SR9.3.056		PASS/FAIL REQUESTS (STUDENTS)		AC	5			AC=Graduation date or last attendance.		Although student records created and maintained by medical and dental schools are usually narrative assessments of academic progress or clinical practice, for purposes of this retention schedule, such records are in the same category as the academic record.	





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A/I – Transfer to State/University Archivist  
R/O – Review by State/University Archivist

1. Agency Code: 750		2. Agency Name: THE UNIVERSITY OF TEXAS AT TYLER									
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				
SR9.3.057		PERSONAL DATE INFORMATION FORMS		PM							
SR9.3.059	4.2.002	TRANSCRIPT REQUESTS & RECEIPTS		AC	1			AC=End of academic term.			
SR9.3.060		TRANSFER CREDIT EVALUATIONS		PM						Although student records created and maintained by medical and dental schools are usually narrative assessments of academic progress or clinical practice, for purposes of this retention schedule, such records are in the same category as the academic record.	
SR9.3.061		TUITION AND FEE CHARGES		AC	5			AC=Graduation date or last attendance.			



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					Years	Months	Days				
SR9.3.062		WITHDRAWAL AUTHORIZATIONS		PM						Although student records created and maintained by medical and dental schools are usually narrative assessments of academic progress or clinical practice, for purposes of this retention schedule, such records are in the same category as the academic record.	
SR9.3.068	1.3.001	CATALOGS		PM					I	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.	



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					Years	Months	Days				
SR9.3.069		COMMENCEMENT PROGRAM		PM					I	Although student records created and maintained by medical and dental schools are usually narrative assessments of academic progress or clinical practice, for purposes of this retention schedule, such records are in the same category as the academic record.	
SR9.3.070		DEGREE STATISTICS		PM						Although student records created and maintained by medical and dental schools are usually narrative assessments of academic progress or clinical practice, for purposes of this retention schedule, such records are in the same category as the academic record.	



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					Years	Months	Days				
SR9.3.071		ENROLLMENT STATISTICS		PM						Although student records created and maintained by medical and dental schools are usually narrative assessments of academic progress or clinical practice, for purposes of this retention schedule, such records are in the same category as the academic record.	
SR9.3.072		GRADE STATISTICS		PM						Although student records created and maintained by medical and dental schools are usually narrative assessments of academic progress or clinical practice, for purposes of this retention schedule, such records are in the same category as the academic record.	



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					Years	Months	Days				
SR9.3.073		RACE/ETHNICITY STATISTICS		PM						Although student records created and maintained by medical and dental schools are usually narrative assessments of academic progress or clinical practice, for purposes of this retention schedule, such records are in the same category as the academic record.	
SR9.3.074		SCHEDULE OF CLASSES (INSTITUTIONAL)		PM						Although student records created and maintained by medical and dental schools are usually narrative assessments of academic progress or clinical practice, for purposes of this retention schedule, such records are in the same category as the academic record.	
SR9.3.304		ADDRESS CHANGE FORMS		PM							



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					Years	Months	Days				
SR9.3.305		CAREER PLACEMENT FILES		AC	5			AC=Graduation date or last attendance.			
SR9.3.306		DISABILITY SUPPORT		AC	5			AC=Graduation date or last attendance.			
SR9.3.308		STUDENT COUNSELING RECORDS	CORE CURRICULUM EVALUATIONS USED FOR ADMISSION DECISIONS	AC	5			AC=Graduation date or last attendance.			
SR9.3.316		DUPLICATE RECORDS	(REGISTRAR KEEPS PERMANENT COPY - BELOW IS FOR COPIES KEPT BY OTHERS) INACTIVE STUDENTS	AC	2			AC=Last attendance date.			
SR9.3.316a		DUPLICATE RECORDS	(REGISTRAR KEEPS PERMANENT COPY - BELOW IS FOR COPIES KEPT BY OTHERS) GRADUATED STUDENTS	AC	1			AC=Graduation date or last attendance.			
SR9.3.317		FRESHMAN ADVISING FILES		AC	5			AC=After first attendance date.			
SR9.4.063		ENROLLMENT VERIFICATIONS		AC	1			AC=After date submitted.			
SR9.4.064		FINANCIAL AID ASSISTANT RECORDS		AC	5			AC=Graduation date or last attendance.			
SR9.4.065		SOCIAL SECURITY CERTIFICATIONS		AC	1			AC=After date submitted.			



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					Years	Months	Days				
SR9.4.066		TEACHER CERTIFICATIONS		PM						Although student records created and maintained by medical and dental schools are usually narrative assessments of academic progress or clinical practice, for purposes of this retention schedule, such records are in the same category as the academic record.	
SR9.4.067		VETERAN STUDENTS CERTIFICATION	VETERANS ADMINISTRATION EDUCATIONAL ASSISTANCE ALLOWANCES	AC	3			AC=Graduation date or last attendance.			
SR9.5.075		REQUESTS FOR FORMAL HEARINGS - ACADEMIC		PM						Although student records created and maintained by medical and dental schools are usually narrative assessments of academic progress or clinical practice, for purposes of this retention schedule, such records are in the same category as the academic record.	



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					Years	Months	Days				
SR9.5.076		REQUESTS FOR FORMAL HEARINGS - STUDENT		PM						Although student records created and maintained by medical and dental schools are usually narrative assessments of academic progress or clinical practice, for purposes of this retention schedule, such records are in the same category as the academic record.	
SR9.5.077		REQUESTS AND DISCLOSURES OF PERSONAL IDENTIFIABLE INFORMATION		PM						Although student records created and maintained by medical and dental schools are usually narrative assessments of academic progress or clinical practice, for purposes of this retention schedule, such records are in the same category as the academic record.	





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					Years	Months	Days				
SR9.5.078		STUDENTS REQUESTS FOR NONDISCLOSURE OF DIRECTORY INFORMATION		PM						Although student records created and maintained by medical and dental schools are usually narrative assessments of academic progress or clinical practice, for purposes of this retention schedule, such records are in the same category as the academic record.	
SR9.5.079		STUDENT STATEMENTS ON CONTENT OF RECORDS REGARDING HEARING PANEL DECISIONS - ACADEMIC		PM						Although student records created and maintained by medical and dental schools are usually narrative assessments of academic progress or clinical practice, for purposes of this retention schedule, such records are in the same category as the academic record.	



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					Years	Months	Days				
SR9.5.080		STUDENT STATEMENTS ON CONTENT OF RECORDS REGARDING HEARING PANEL DECISIONS - STUDENT		PM						Although student records created and maintained by medical and dental schools are usually narrative assessments of academic progress or clinical practice, for purposes of this retention schedule, such records are in the same category as the academic record.	
SR9.5.081		STUDENT'S WRITTEN CONSENT FOR RECORD DISCLOSURE		PM							
SR9.5.082		WAIVERS FOR RIGHTS OF ACCESS		PM						Although student records created and maintained by medical and dental schools are usually narrative assessments of academic progress or clinical practice, for purposes of this retention schedule, such records are in the same category as the academic record.	



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					Years	Months	Days				
SR9.5.083		WRITTEN DECISIONS OF HEARING PANELS		PM						Although student records created and maintained by medical and dental schools are usually narrative assessments of academic progress or clinical practice, for purposes of this retention schedule, such records are in the same category as the academic record.	
SR9.5.509		SUBPOENA REQUESTS		PM							
SR9.5.510		SUBPOENA REQUESTS WITH COURT ORDER FOR NON-DISCLOSURE		PM							
SR9.6.002		SRK (STUDENT RIGHT-TO-KNOW ACT)	GRADUATION COMPLETION, TRANSFER-OUT DATA	PM							
SR9.6.003		ATHLETIC PARTICIPATION/EADA [EQUITY IN ATHLETICS ANALYSIS] DOCUMENTS		AC	5			AC=Date or required disclosure.			



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					Years	Months	Days				
SR9.6.004	1.1.070	INSTITUTIONAL INFORMATION - WITHDRAWAL POLICIES AND PROCEDURES		AC	3			AC=Completion or termination of rules, policies, or procedures.	O	Federal regulations do not specify the length of retention.	
SR9.7.084		PROGRAM PARTICIPATION AGREEMENT		AC	3			AC=End of award year.			
SR9.7.086	1.1.067	REPORTS TO STATE AGENCIES		AC	3			AC=End of award year.	O	Federal regulations require that information be retained at least three (3) years after the end of the year in which the student received their financial aid funding.	



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					Years	Months	Days				
SR9.7.087		AUDIT AND REVIEW REPORTS - FINANCIAL AID OFFICE'S COPY		AV						NOTE: The official copy of internal and external audit reports are kept by the Office of Audit Services under 1.1.002 for 7 years. Federal regulations require that information be retained at least three (3) years after the end of the year for which the audit was performed, unless there are cited findings, in which case, these documents must be kept until the findings are resolved.	
SR9.7.088		SELF-EVALUATION REPORTS - PEER REVIEW S OR SELF-EVALUATION TOOLS		AC	3			AC=End of award year.		Federal regulations require that information be retained at least three (3) years after the end of the year for which the audit was performed, unless there are cited findings, in which case, these documents must be kept until the findings are resolved.	



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					Years	Months	Days				
SR9.7.089	4.5	OTHER REPORTS	PERTAINING TO FINANCIAL RESPONSIBILITY AND STANDARDS OF ADMINISTRATIVE CAPABILITY	AC	3			AC=End of award year.		Federal regulations require that information be retained at least three (3) years after the end of the year for which the audit was performed, unless there are cited findings, in which case, these documents must be kept until the findings are resolved.	
SR9.7.090		RECORDS OF SFA [STUDENT FINANCIAL AID]	PROGRAM TRANSACTIONS	AC	3			AC=End of award year.		Federal regulations require that information be retained for a minimum of three (3) years after the end of the year in which the student received the financial assistance; except for student loan documents that must be retained three (3) years after the full repayment of the loan.	



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					Years	Months	Days				
SR9.7.091	4.7.002	BANK STATEMENTS FOR ACCOUNTS CONTAINING SFA [STUDENT FINANCIAL AID] FUNDS		AC	3			AC=End of award year.		Federal regulations require that information be retained at least three (3) years after the end of the year in which the student received their financial aid funding.	
SR9.7.093	4.4.001	LEDGERS IDENTIFYING SFA TRANSACTIONS		AC	3			AC=End of award year.		Federal regulations require that information be retained at least three (3) years after the end of the year in which the student received their financial aid funding.	
SR9.7.094	4.5.001	RECORDS SUPPORTING DATA ON REQUIRED REPORTS	(PROGRAM RECONCILIATIONS, AUDIT REPORTS, SCHOOL RESPONSES, PELL GRANT STATEMENTS, ACCREDITING AND LICENSING AGENCY REPORTS)	AC	3			AC=End of award year.		Federal regulations require that information be retained at least three (3) years after the end of the year when the information was submitted to the various federal agencies.	



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					Years	Months	Days				
SR9.7.095		FEDERAL WORK - STUDY PAYROLL RECORDS		AC	3			AC=End of award year.		Federal regulations require that information be retained for a minimum of three (3) years after the end of the year in which the student received the financial assistance; except for student loan documents that must be retained three (3) years after the full repayment of the loan	
SR9.7.096		SAR [STUDENT AID REPORT]/ISIR [INSTITUTIONAL STUDENT INFORMATION REPORT]		AC	3			AC=End of award year.		Federal regulations require that information be retained for a minimum of three (3) years after the end of the year in which the student received the financial assistance; except for student loan documents that must be retained three (3) years after the full repayment of the loan.	





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					Years	Months	Days				
SR9.7.098		DOCUMENTATION OF STUDENT ELIGIBILITY		AC	3			AC=End of award year.		Federal regulations require that information be retained for a minimum of three (3) years after the end of the year in which the student received the financial assistance; except for student loan documents that must be retained three (3) years after the full repayment of the loan.	
SR9.7.099		FINANCIAL AID HISTORY FOR TRANSFER STUDENT		AC	3			AC=End of award year.		Federal regulations require that information be retained for a minimum of three (3) years after the end of the year in which the student received the financial assistance; except for student loan documents that must be retained three (3) years after the full repayment of the loan.	



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					Years	Months	Days				
SR9.7.100		DOCUMENTATION OF STUDENT 'S SATISFACTORY ACADEMIC PROGRESS		AC	3			AC=End of award year.		Federal regulations require that information be retained for a minimum of three (3) years after the end of the year in which the student received the financial assistance; except for student loan documents that must be retained three (3) years after the full repayment of the loan.	
SR9.7.101		DOCUMENTATION OF STUDENT'S PROGRAM OF STUDY AND COURSES ENROLLED IN		AC	5			AC=End of award year.			
SR9.7.102		DATA USED TO ESTABLISH STUDENT'S ADMISSION, ENROLLMENT AND STATUS		AC	5			AC=End of award year.			



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					Years	Months	Days				
SR9.7.103		DOCUMENTS USED TO VERIFY APPLICANT'S DATA		AC	3			AC=End of award year.		Federal regulations require that information be retained at least three (3) years after the end of the year when the information was submitted to the various federal agencies.	
SR9.7.104		DOCUMENTATION RELATING TO RECEIPT OF AID		AC	3			AC=End of award year.		Federal regulations require that information be retained for a minimum of three (3) years after the end of the year in which the student received the financial assistance; except for student loan documents that must be retained three (3) years after the full repayment of the loan.	



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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				
SR9.7105		DATE AND AMOUNT OF DISBURSEMENTS		AC	3			AC=End of award year.		Federal regulations require that information be retained for a minimum of three (3) years after the end of the year in which the student received the financial assistance; except for student loan documents that must be retained three (3) years after the full repayment of the loan.	
SR9.7.106		DOCUMENTATION OF INITIAL OR EXIT LOAN COUNSELING		AC	3			AC=End of award year.		Federal regulations require that information be retained for a minimum of three (3) years after the end of the year in which the student received the financial assistance; except for student loan documents that must be retained three (3) years after the full repayment of the loan.	



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					Years	Months	Days				
SR9.7.108		CAMPUS-BASED AID	(PERKINS LOAN, SEOG [SUPPLEMENTAL EDUCATIONSL OPPORTUNITY GRANT] AND FEDERAL WORKSTUDY)	AC	3			AC=End of award year.		Federal regulations require that information be retained for a minimum of three (3) years after the end of the year in which the student received the financial assistance; except for student loan documents that must be retained three (3) years after the full repayment of the loan.	
SR9.7.109		PELL GRANT		AC	3			AC=End of award year.		Federal regulations require that information be retained for a minimum of three (3) years after the end of the year in which the student received the financial assistance; except for student loan documents that must be retained three (3) years after the full repayment of the loan.	



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					Years	Months	Days				
SR9.7.110		FISAP [FISCAL OPERATIONS REPORT AND APPLICATION TO PARTICIPATE]		AC	3			AC=End of award year.		Federal regulations require that information be retained at least three (3) years after the end of the year when the information was submitted to the various federal agencies.	
SR9.7.113		FFEL [FEDERAL FAMILY EDUCATION LOAN & DIRECT LOANS]: BORROWER'S ELIGIBILITY RECORDS		AC	3			AC=End of award year student last attended.		Federal regulations require that information be retained for a minimum of three (3) years after the end of the year in which the student received the financial assistance; except for student loan documents that must be retained three (3) years after the full repayment of the loan. Electronic records and files will replace paper records and files.	
SR9.7.114		ALL OTHER RECORDS/REPORTS		AC	3			AC=End of award year.			



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					Years	Months	Days				
SR9.7.115		REPORT AND FORMS USED FOR PARTICIPATION IN THE SFA PROGRAM		AC	3			AC=End of award year.			
SR9.7.116		APPLICATION DATA SUBMITTED TO THE DEPOT OF ED OR LENDER		AC	3			AC=End of award year.		Federal regulations require that information be retained at least three (3) years after the end of the year when the information was submitted to the various federal agencies.	
SSC1.1		STUDENT COUNSELING RECORDS		AC	10			AC=Date of last consultation.		For patients less than 18 years of age when last treated, the records must be kept at least until the patient's 21st birthday or 7 years after the date that the patient was last treated, whichever is later.	
UP6.1.001		POLICE CASE REPORTS		PM							
UP6.1.002	5.4.013	POLICE DISASTER RECOVERY PLAN		US							
UP6.1.003		POLICE INCIDENT REPORTS			3						20 U.S.C. 1092(f)



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					Years	Months	Days				
UP6.1.004		POLICE OFFENSE REPORTS		AC				AC=Statue of Limitations.		Refer to PS4125-05, Offense Investigation Records, Local Schedule PS, Records Common to Public Safety Agencies, 3rd ed.	
UP6.1.005		POLICE PERSONNEL BACKGROUND INFO			3						
UP6.1.006	3.3.024	POLICE POLICY AND PROCEDURE MANUAL		US	5						
UP6.1.007		PARKING CITATIONS		AC	2			AC=After final disposition (paid, voided, etc.)			
UP6.1.008		CLERY REPORTS	POLICE/SECURITY REPORTS, JUDICIAL REPORTS	AC	7			AC=Date of required disclosure.			
ADM1.1	1.1	ACCREDITATION STUDIES		US	5					Record copy only.	
ADM1.1a	1.1	ACCREDITING & LICENSING AGENCY	REVIEW, APPROVALS, AND REPORTS	PM							
ADM1.1b	1.1	ACCREDITATION WORKING PAPERS		AC	10			AC=Date of certification of accreditation.			
ADM1.1c	1.1	DEEDS AND RELATED DOCUMENTS		LA							
ADM1.1d	1.1	DEGREE PROPOSALS		PM					O		





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					Years	Months	Days				
ADM1.1e	1.1	GIFT RECORDS		PM					I	Security is open with restrictions.	Government Code Sec. 552.1235
ADM1.1f	1.1	PATENTS, TRADEMARKS COPYRIGHTS AND DOCUMENTATION	(RESEARCH RECORDS, REFLECTING USAGE AND LIKE)	AC	20			AC=Term of Agreement, Copyright, Trademark or Patent includes underlying patents, trademarks and copyrights.			3U.S.C./SEC.15
ADM1.1.002	1.1.002	INTERNAL AUDIT REPORT		AC	7			AC=Publication or release of final audit findings.		To be maintained by Internal Audit Office of Institution.	
ADM1.1.002a	1.1.002	INTERNAL AUDIT WORKING PAPERS		AC	7			AC=Publication or release of final audit findings.		To be maintained by Internal Audit Office of Institution.	
ADM1.1.002b	1.1.002	EXTERNAL AUDITS		AC	7			AC=Publication or release of final audit findings.		The record copy of any audit preformed by the State of Texas Auditors Office is retained permanently by that office.	



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					Years	Months	Days				
ADM1.1.004	1.1.004	LEGISLATIVE BUDGET REQUEST	(RECORD COPY)	AC	6			AC=Passage of Act.	I	Record Copy Only. ARCHIVAL NOTE: The archive requirement is met by UT System 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.	
ADM1.1.006	1.1.006	COMPLAINT RECORDS (PUBLIC)		AC	2			AC=Final disposition of the complaint.			
ADM1.1.007	1.1.007	CORRESPONDENCE, ADM.	(INCOMING/OUTGOING LETTERS)		4				O	Evaluate for archival value after 4 years. Caution: only for correspondence that is included in another series in this schedule.	
ADM1.1.008	1.1.008	CORRESPONDENCE, GENERAL	(INCOMING/OUTGOING LETTERS, GENERAL INQUIRIES AND REQUESTS)		2					Caution: only for correspondence that is not included in another series in this schedule.	



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					Years	Months	Days				
ADM1.1.010	1.1.010	DIRECTIVES		US	1						
ADM1.1.011	1.1.011	EXECUTIVE ORDERS		US	3				I	US= Until superseded	
ADM1.1.013	1.1.013	CALENDARS/APPOINTMENT AND ITINERARY RECORDS		CE	1				O	ARCHIVES NOTE: Only the calendars, appointment, and itinerary records of elected officials, executive staff, board or commission members, division directors, and program heads require archival review. Contact the University Archives when these records have met their retention periods.	
ADM1.1.014	1.1.014	LEGAL OPINIONS AND ADVICE		AV					O		
ADM1.1.019	1.1.019	PUBLIC RELATIONS RECORDS			2				O		
ADM1.1.020	1.1.020	PUBLIC INFORMATION REQUESTS - NOT EXEMPT	INCLUDES ALL CORRESPONDENCE AND DOCUMENTATION RELATING TO REQUESTS FOR RECORDS THAT ARE FURNISHED TO THE PUBLIC UNDER PUBLIC INFORMATION ACT. (CHAPTER 552, GOVERNMENT CODE)	AC	1			AC=Date request fulfilled.			



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					Years	Months	Days				
ADM1.1.021	1.1.021	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=Date of notification that records are exempt.			
ADM1.1.023	1.1.023	ORGANIZATIONAL CHARTS		US					I		
ADM1.1.024	1.1.024	PLANS AND PLANNING RECORDS		AC	3			AC=Decision made to implement or not to implement result of planning process.	O		
ADM1.1.040	1.1.040	SPEECHES AND PAPERS	(AGENCY WORK RELATED)	AC				AC=End of term of office or termination of service in a state position.	O		
ADM1.1.041	1.1.041	SUGGESTION SYSTEM RECORDS			1						
ADM1.1.043	1.1.043	TRAINING MATERIALS		US	1						



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ADM1.1.048	1.1.048	LITIGATION FILES		AC	20			AC=As applicable, decision of the university not to file a lawsuit or decision that a lawsuit will not be filed against the university on a mater; dismissal of a lawsuit for want of prosecution or on motion of the plaintiff, or final decision of a court (or a court on appeal, if applicable) in a lawsuit.	I		
ADM1.1.053	1.1.053	REGISTRATION LOGS		AC				AC=Report filed with the Texas Ethics Commission.			
ADM1.1.055	1.1.055	STRATEGIC PLANS	(RECORD COPY)	PM					I	Record Copy Only. 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.	



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ADM1.1.056	1.1.056	ADA DOCUMENTATION (AMERICANS WITH DISABILITIES ACT)			3						28 CFR 35.105(C).



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ADM1.1.057	1.1.057	TRANSITORY INFORMATION		AC				AC=Purpose of record has been fulfilled.		Records of temporary usefulness that are not an integral part of a records series of an agency, that are not regularly filed within an agency's recordkeeping system, and that are required only for a limited period of time for the completion of an action by an official or employee of the agency or in the preparation of an on-going records series. Transitory records are not essential to the fulfillment of statutory obligations or to the documentation of agency functions. Some examples of transitory information, which can be in any medium (voice, mail, fax, email, hard copy, etc.) are routine messages; telephone messages 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	



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					Years	Months	Days				
ADM1.1.059	1.1.059	MEETINGS, CERTIFIED AGENDAS OR TAPE RECORDINGS OF CLOSED		AC	2			AC=The date of the meeting or completion of pending action involving the meeting, whichever is later.			Government Code 551.104(a)
ADM1.1.063	1.1.063	STAFF MEETING MINUTES AND NOTES			1						
ADM1.1.064	1.1.064	AGENCY PERFORMANCE MEASURES DOCUMENTATION		FE	3						
ADM1.1.065	1.1.065	REPORTS AND STUDIES (NON-FISCAL)-RAW DATA		AV						CAUTION: Does not include source documentation used for information or data included in or directly related to another record series in the schedule. SEE especially item number 1.1.064.	
ADM1.1.066	1.1.066	REPORTS-BIENNIAL OR ANNUAL AGENCY (NARRATIVE)		AC	6			AC=September 1 of odd numbered years.	I	ARCHRIVES 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.	





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ADM1.1.067	1.1.067	REPORTS AND STUDIES (NON-FISCAL)			3						
ADM1.1.068	1.1.068	REPORTS ON PERFORMANCE MEASURES		AC	6			AC=September 1 of odd numbered years.			
ADM1.1.069	1.1.069	ACTIVITY REPORTS	PERTAINING TO WORKLOAD MONITORING, TASK COMPLETIONS AND NUMBER OF CONTACTS, SIMILAR ACTIVITIES		1						
ADM1.1.070	1.1.070	AGENCY RULES, POLICIES AND PROCEDURES - FINAL BOARD OF REGENTS RULES AND REGULATIONS		AC	3			AC=COMPLETION OF TERMINATION OF PROGRAM RULES, POLICIES OR PROCEDURES.	O	SEE ALSO: Agency Rules, Polices and Procedures - Working Files, item number 1.1.071.	
ADM1.1.071	1.1.071	AGENCY RULES, POLICIES AND PROCEDURES - WORKING FILES		AC	3			AC=Completion of termination of program rules, policies, or procedures.	O	SEE ALSO: item number 1.1.070.	
ADM1.1.072	1.1.072	PUBLIC INFORMATION REPORTS			2						
ADM1.2.001	1.2.001	DESTRUCTION AUTHORIZATIONS		FE	3						



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ADM1.2.003	1.2.003	FORMS HISTORY FILES		AC	1			AC=Discontinuance of use of form.			
ADM1.2.004	1.2.004	FORMS INVENTORY		US							
ADM1.2.005	1.2.005	RECORDS RETENTION SCHEDULE (SLR 105)		US							
ADM1.2.006	1.2.006	RECORDS TRANSMITTAL FORMS		AC	2			AC=Date of authorization of destruction, permanent transfer from storage by the records management officer.			
ADM1.2.008	1.2.008	REQUEST FOR AUTHORITY TO DISPOSE OF STATE RECORDS (RMD 102)		FE	3					Original is retained by the State and Local Records Management Division, Texas State Library and Archives Commission.	
ADM1.2.010	1.2.010	RECORDS DISPOSITION LOGS			10						
ADM1.2.012	1.2.012	RECORDS INVENTORY WORKSHEETS		US							
ADM1.2.013	1.2.013	RECORDS CONTROL LOCATOR AIDS		AC				AC=When control aid is updated, revised or no longer needed.			



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ADM1.2.014	1.2.014	RECORDS MANAGEMENT PLANS		US	1						
ADM1.2.015	1.2.015	DISASTER RECOVERY SERVICE TRANSMITTALS (RMD 109)		FE	1						
ADM1.2.016	1.2.016	DISASTER RECOVERY SERVICE APPROVAL FORM (RMD 113)		AC				AC=Until superseded or termination of service.			



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					Years	Months	Days				
ADM1.3.001	1.3.001	STATE PUBLICATIONS		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. 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 3.1-3.16; Government Code 441.101-441.106



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A/I – Transfer to State/University Archivist  
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					Years	Months	Days				
ADM1.3.002	1.3.002	PUBLICATIONS DEVELOPMENT FILES		AC	2			AC=Date of authorization of destruction.	O		
IR2.1.001	2.1.001	PROCESSING FILES		AC				AC=Completion of 3rd verification.			
IR2.1.002	2.1.002	MASTER FILES		AC				AC=Completion of 3rd verification.			
IR2.1.007	2.1.007	SOFTWARE PROGRAMS		AC				AC=Until electronic records are transferred to and made useable in a new software environment.			13 TAC 69.4.
IR2.1.008	2.1.008	HARDWARE DOCUMENTATION		AC				AC=Until electronic records are transferred to and made useable in a new hardware environment.			13 TAC 69.4.
IR2.1.009	2.1.009	TECHNICAL DOCUMENTATION		AC				AC=Until electronic records are transferred to and made useable in a new hardware environment.			13 TAC 69.4.
IR2.1.010	2.1.010	AUDIT TRAIL RECORDS		AC				AC=All audit requirements have been met.			
IR2.1.011	2.1.011	FINDING AIRDS, INDEXES, AND TRACKING SYSTEMS		AC				AC=The related records have been destroyed.			



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IR2.2.000	2.2	ELECTRONIC LEARNING SYSTEM RECORDS		AC	3			AC=Completion of 3rd update cycle.			
IR2.2.001	2.2.001	SYSTEM MONITORING RECORDS		AV							
IR2.2.002	2.2.002	CHARGEBACK RECORDS TO DATAPROCESSING SERVICE USERS		FE	3						
IR2.2.004	2.2.004	COMPUTER JOB SCHEDULES		US		3					
IR2.2.010	2.2.010	DATA PROCESSING POLICIES AND PROCEDURES MANUAL		US	3						
IR2.2.011	2.2.011	BATCH DATA ENTRY CONTROL RECORDS		AC				AC=When reconciliation confirmed.			
IR22.012	2.2.012	OUTPUT RECORDS FOR COMPUTER PRODUCTION	ACCEPTED, REJECTED, & SUSPENDED TRANSACTIONS	AV							
IR2.2.013	2.2.013	QUALITY ASSURANCE		AC				AC=No longer needed as an audit trail for modified records.			



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IR2.2.014	2.2.014	INTERNET COOKIES		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).	
IR2.2.015	2.2.015	HISTORY FILES - WEB STIES		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).	



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IR2.2.016	2.2.016	SOFTWARE REGISTRATIONS, WARRANTIES AND LICENSE AGREEMENTS		LA	3						
HR3.1	3.1	EXTERNAL EMPLOYMENT/CONFLICT OF INTEREST ACKNOWLEDGEMENT FORM	Includes requests for approval, authorizations, internal disclosures related to such activities.	AC	7			AC=Termination of Employment			
HR3.1.001	3.1.001	APPLICATIONS OF EMPLOYEES (NOT HIRED)	Applications, resumes, transcripts, letters of reference, and similar documents whose submission by candidates for vacant positions is required n the application form, by application procedures, or in the employment ad.		2					Includes Temporary Employment	29 CFR 1602.49(a)
HR3.1.002	3.1.002	APPLICATIONS OF EMPLOYEES (HIRED)	Applications, resumes, transcripts, letters of reference, and similar documents whose submission by candidates for vacant positions is required n the application form, by application procedures, or in the employment ad.	AC	5			AC=Termination of employee.		Includes Temporary Employment and Certificate of Age (minor workers)	





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HR3.1.006	3.1.006	EMPLOYEE COUNSELING	Notes, memoranda, or reports relating to the counseling of an employee for work-related, personal, or substance abuse problems.	AC	3			AC=Termination of counseling.		Period is AC+7 if counseling provided by, and records kept by a licensed psychologist as required by 22 Tx Admin Code 465.22 (d)(2).	
HR3.1.011	3.1.011	EMPLOYEE INSURANCE RECORDS	Copies of information relating to the selection by employees of life, disability, health, and other types of insurance offered by UTS/UT Tyler to its employees.	AC	50			AC=Until superseded or termination of employment.		CAUTION: Documents that serve as payroll deduction authorization must be maintained for the retention period prescribed for item number PY3.2.001	
HR3.1.012	3.1.012	EMPLOYMENT OPPORTUNITY ANNOUNCEMENTS	Internal or external announcements or advertisements of job openings, promotions, training programs. Or opportunities for overtime.		2						29 cfr1602.49(a)
HR3.1.013	3.1.013	EMPLOYMENT CONTRACTS	Executed, renewed, or amended on or after September 1, 2015.	AC	7			AC=Expiration or termination of the contact according to its terms. (Termination of Employment)			Government Code, 441.1855



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					Years	Months	Days				
HR3.1.013a	3.1.013a	EMPLOYMENT CONTRACTS	Executed, renewed, or amended on or before August 31, 2015.	AC	4			AC=Expiration or termination of the contact according to its terms. (Termination of Employment)			Government Code, 441.1855
HR3.1.014	3.1.14	EMPLOYMENT SELECTION RECORDS	Includes notes of interviews with candidates, questions asked of applicants, audio and videotapes of job interviews, driving records, and previous injury checks, pre-employment physical examinations, pre-employment drug testing, polygraph examination results; and all other records that document the selection process.		3					CAUTION: Does not include criminal history checks. See 3.1.026.	41 CFR 60-300.44 and 41 CFR 60-741.44 (Federal Affirmative Action, Veterans); 29 CFR 1602.31(State Agencies), 29 CFR 1602.49(a) and Texas Government Code §411.094(e) (State Universities)



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HR3.1.018	3.1.18	GRIEVANCE RECORDS	Records relating to the review of employee grievances against personnel policies, working conditions, etc.	AC	5			AC=Termination of employment.		CAUTION: Does not include formal complaints filed by an employee with the Equal Employment Opportunity Commission or other local, state, or federal agency. See Item number 1.1.048.	
HR3.1.019	3.1.019	PERFORMANCE APPRAISALS		AC	5			AC=Termination of employment.		See Agency item number HR3.1.019a for Faculty performance records.	29 CFR 1620.32©
HR3.1.019a	3.1.019a	FACULTY PERFORMANCE RECORDS (PROMOTION, TENURE, POST-TENURE REVIEW)		AC	5			AC=Termination of employment.			



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HR3.1.020	3.1.020	PERSONNEL CORRECTIVE ACTION DOCUMENTATION	Does not affect pay, status or tenure	AC	5			AC=Termination of employment.		CAUTION: If, during the retention period of this records series, any part of this series is used to document and support personnel disciplinary action under item number 3.1.021, all documentation from this series used to support disciplinary action must be retained for the minimum retention period described by item number 3.1.021.	
HR3.1.021	3.1.021	PERSONNEL DISCIPLINARY ACTION DOCUMENTATION	Affects pay, status or tenure.	AC	5			AC=Termination of employment.			29 CFR 1602.49(a)
HR3.1.022	3.1.022	PERSONNEL INFORMATION OR ACTION FORM	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.	AC	5			AC=Termination of employment.		PAF or eForm.	29 CFR 1602.49(a)



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HR3.1.023	3.1.023	POSITION/JOB DESCRIPTIONS	Job descriptions, including all associated task or skill statements, for positions in agency.	AC	5			AC=Termination of employment.			40 TAC 815.106(i)
HR3.1.024	3.1.024	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=Until superseded or termination of employment.		CAUTION: Does not include pre-employment physical examinations. See item number 3.1.014.	
HR3.1.026	3.1.026	CRIMINIAL HISTORY CHECKS	Criminal history record information on job applicants or agency employees.	AC				AC=The criminal history record has served the immediate purpose for which it was obtained.		NOTE: See agency item number 3.1.014 for criminal history background check consent forms. 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.	



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					Years	Months	Days				
HR3.1.027	3.1.027	TRAINING AND EDUCATIONAL ACHIEVEMENT RECORDS (INDIVIDUAL)	Certificates of completion, transcripts, test scores, or similar records documenting the training, testing, or continuing education achievements of an employee.	AC	5			AC=Termination of employment.			
HR3.1.029	3.1.029	DOCUMENTATION OR VERIFICATION OF EMPLOYMENT ELIGIBILITY	Federal reporting form (INS I-9)	AC	1			AC=Termination of employment.		CAUTION: Federal regulation requires that INS I-9 forms be retained for 3 years from date of hire or 1 year after separation of the employee, whichever later. Agencies should make certain that the INSF 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), (c)(2)
HR3.1.031	3.1.031	EMPLOYEE BENEFITS - OTHER THAN INSURANCE	Agency copies of information relating to the selection of available benefit options other than insurance.	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	



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HR3.1.034	3.1.034	RESUMES (UNSOLICITED)	Retention period applies if replies are made to the sender of resume stating that it will be kept on file for future job openings.	AV						See item number 3.1.014 for resumes, whether solicited or unsolicited, that are used in any way in the employment selection process.	
HR3.1.036	3.1.036	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						29CFR 30.8(e).
HR3.1.037	3.1.037	EMPLOYEE RECOGNITION	Awards, incentives, tenure, etc.	AC	5			AC=Termination of employment.			



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HR3.1.038	3.1.038	PUBLIC ACCESS OPTION FORM	Form completed and signed by employee or official or former employee or official, electing to keep home address, home telephone number, social security number, and family information open or confidential under the Public Information Act, Government code 552.024.	US						See item number 3.3.011.	
HR3.1.039	3.1.039	OMBUDSMAN RECORDS	Consultation records, notes, letters, memos, emails, reports and other documentation.	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, 3.1.018, 3.1.020, and 3.1.021.	





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PY3.2.001	3.2.001	EMPLOYEE DEDUCTION AUTHORIZATION		AC	4			AC=After termination of employee or after amendment, expiration, or termination of authorization, whichever sooner.			
PY3.2.002	3.2.002	EMPLOYEE EARNINGS RECORDS			4					All audit requirements must be met.	40 TAC 815.106(i)
PY3.2.003	3.2.003	FEDERAL TAX RECORDS		AC	20			AC=Tax due date, date filed or date tax is paid, whichever is later.			26 CFR 31.6001-1(e)(2)
PY3.2.004	3.2.004	INCOME ADJUSTMENT AUTHORIZATIONS			2						29 CFR 516.6(c)
PY3.2.005	3.2.005	W-4 FORMS		AC	4			AC=Until superseded, obsolete, or separation of employee.			26 CFR 31.6000-1(e)(2).
PY3.2.006	3.2.006	WAGE RATE TABLES			2						29 CFR 516.6(a)(2)
PY3.2.007	3.2.007	UNEMPLOYMENT COMPENSATION		CE	5						
PY3.2.008	3.2.008	DIRECT DEPOSIT AUTHORIZATIONS		US							
PY3.2.009	3.2.009	STATE DEFERRED COMPENSATION		AC	5			AC=After total distribution of account.			



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PY3.2.010	3.2.010	HUMAN RESOURCE INFORMATION SYSTEM (HRIS)	Reports and supporting documentation	AC	4						
HR3.3.001	3.3.001	AFFIRMATIVE ACTION PLANS	For both regular employees and apprenticeship programs		5					For apprenticeship plans.	29 CFR § 30.12(d).
HR3.3.004	3.3.004	EMPLOYEE BENEFIT PLANS	Employee benefit plans such as pension, life, health, and disability insurance; deferred compensation; etc., including amendments.	US	1						29 CFR 1627.3(b)(2)
HR3.3.010	3.3.010	LABOR STATISTICS REPORTS	Reports providing statistical information on labor force.		3						
HR3.3.011	3.3.011	FORMER EMPLOYEE VERIFICATION RECORD	Minimum information needed to verify employment includes name, SSN, exact dates of employment, last known address and most recent public access option form.	AC	75			AC=Termination of employment.		See item number 3.1.038.	
HR3.3.015	3.3.015	POSITION/JOB CLASSIFICATION REVIEW FILE	Records relating to review and monitoring of job classifications within an agency.	US	3						
HR3.3.020	3.3.020	WORK SCHEDULES/ASSIGNMENTS	Work, duty, shift, crew, or case schedules, rosters, or assignments		2						



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HR3.3.022	3.3.022	TEXAS WORKFORCE COMMISSION (TWC) REPORTS	Reports from TWC to the agency or its predecessor pertaining to employees.		3						
HR3.3.023	3.3.023	REIMBURSABLE ACTIVITIES, REQUESTS AND AUTHORIZATIONS TO ENGAGE IN	Request 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					Includes request for tuition assistance.	
HR3.3.024	3.3.024	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						
HR3.3.025	3.3.025	JOB PROCEDURE RECORDS	Any documents detailing the procedural duties and responsibilities of agency positions on a position-by-position basis.	US	3						



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HR3.3.026	3.3.026	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						
HR3.3.027	3.3.027	APTITUDE AND SKILLS TEST AND TEST PAPERS	Aptitude or skills tests required of job applicants or of current personnel to qualify for promotion or transfer.	US	2					CAUTION: One copy of each different test (different in terms of either questions or administration procedures) should be retained for the period indicated.	29 CFR 1602.49(a)
HR3.3.029	3.3.029	APTITUDE AND SKILLS TEST (VALIDATION RECORDS)		AC	2			LA=As long as the test is used by an agency.			29 CFR 1602.49(a)
HR3.3.030	3.3.030	TRAINING ADMINISTRATION RECORDS		US	2					SEE 5.4.007 CAUTION: Does not include hazardous material training records. See item number 5.4.007	



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					Years	Months	Days				
HR3.3.031	3.3.031	EQUAL EMPLOYMENT OPPORTUNITY (EEO) REPORTS AND SUPPORTING DOCUMENTATION	Includes documentation used to complete EEO reports		3						29 CFR 1602.32, 48 and 50
HR3.3.032	3.3.032	EQUAL PAY RECORDS	Reports, studies, aggregated or summary data and similar documentation compiled to monitor and demonstrate compliance with the federal Equal Pay Act.		3						29 CFR 1620.32(c).
HR3.4.001	3.4.001	ACCUMULATED LEAVE ADJUSTMENT REPORTS	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						
PY3.4.002	3.4.002	LEAVE STATUS REPORT		FE	3						
PY3.4.003	3.4.003	LESS THAN FULL TIME WORKED REPORTS			4						40 TAC 815.106(i)
PY3.4.004	3.4.004	OVERTIME AUTHORIZATIONS			2						



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PY3.4.005	3.4.005	OVERTIME SCHEDULES			2						
PY3.4.006	3.4.006	TIME CARDS AND TIME SHEETS		FE	4						40 TAC 815.106(i)
HR3.4.007	3.4.007	TIME OFF AND/OR SICK LEAVE REQUESTS		FE	3					Includes supporting documentation for leave requests, such as physician statements.	
HR3.4.008	3.4.008	SICK LEAVE POOL RECORDS	Donations and Withdrawals		3						
HR3.500.10		J-1 STUDENT INTERN EVALUATIONS (APPLICABLE TO J-1 STUDENT INTERNS)		AC	1			AC=completion of student intern program.			22 C.F.R. § 62.23(i)(5)
HR3.501.10		LABOR CONDITION APPLICATIONS AND PUBLIC INSPECTION FILES (H-1BS AND E-3S)		AC	1			AC=earliest of the following termination of employment under labor condition application, date employee has obtained permanent residence, or date labor condition application expired or withdrawn.			20 C.F.R. § 655.760 (c )



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HR3.502.10		PAYROLL RECORDS (H-1BS AND E-3S)			3					Retention period begins on date of record's creation unless an enforcement action is commenced, then records must be kept in accordance with federal regulations.	20 C.F.R. § 655.760(c)
HR3.503.10		APPLICATION FOR PERMANENT EMPLOYMENT CERTIFICATION	Including all supporting documentation.	AC	5			AC=Date of filing.			20 C.F.R. § 656.10(f)
HR3.504.10		F-1 OPTIONAL PRACTICAL TRAINING RECORDS		AC	1			AC=termination of employment.			
HR3.505.10		O-1S, TNS, J-1S		AC	3			AC=date status ends.		Not including J-1 Student Intern Evaluations, see agency number 3.500.10.	
HR3.506.10		I-140 IMMIGRATION PETITIONS		AC	5			AC=date of acquiring permanent residence or termination.			
HR3.507.10		APPLICATION FOR APPOINTMENT AS A VISITING SCHOLAR		AC	5			AC=date application rejected or termination of appointment.			



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FS4.1.001	4.1.001	ACCOUNTS PAYABLE INFORMATION		FE	3					All audit requirements must be met.	
FS4.1.002	4.1.002	BILLING DETAILS		FE	3					All audit requirements must be met. CAUTION: Does not include long distance telephone billing detail.	
FS4.1.003	4.1.003	CANCELLED CHECKS/WARRANTS		FE	3					All audit requirements must be met.	
FS4.1.004	4.1.004	ENCUMBRANCE DETAIL		FE	3					All audit requirements must be met.	
FS4.1.005	4.1.005	INVENTORY AND OTHER COST FILES		FE	3					All audit requirements must be met.	
FS4.1.006	4.1.006	INVESTMENT TRANSACTION FILES		FE	3					All audit requirements must be met.	
FS4.1.007	4.1.007	TRANSFERS OR BUDGET REVISIONS		FE	3					All audit requirements must be met.	
FS4.1.008	4.1.008	ELECTRONIC FUND TRANSFERS		FE	3						
FS4.2.001	4.2.001	CASH DEPOSIT VOUCHERS		FE	3					All audit requirements must be met.	
FS4.2.002	4.2.002	CASH RECEIPTS		FE	3					All audit requirements must be met.	





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					Years	Months	Days				
FS4.2.003	4.2.003	DAILY CASH RECEIPT LOGS		FE	3					All audit requirements must be met.	
FS4.2.004	4.2.004	ENCUMBRANCE VOUCHERS		FE	3					All audit requirements must be met.	
FS4.2.005	4.2.005	PURCHASE VOUCHERS		FE	3					All audit requirements must be met.	
FS4.2.006	4.2.006	GENERAL JOURNAL VOUCHERS INCLUDING INTEGRATED DATA TRANSFERS		FE	3					All audit requirements must be met.	
FS4.2.007	4.2.007	EXPENDITURE VOUCHERS TRAVEL, PAYROLL, ETC.		FE	3					All audit requirements must be met.	
FS4.3.001	4.3.001	SALES JOURNALS OR REGISTERS		FE	3						
FS4.3.002	4.3.002	RECEIPTS JOURNALS OR REGISTERS		FE	3						
FS4.3.003	4.3.003	EXPENDITURES JOURNALS OR REGISTERS		FE	3						
FS4.4.001	4.4.001	GENERAL LEDGER		FE	3					All audit requirements must be met.	
FS4.4.002	4.4.002	ACCOUNTS RECEIVABLE LEDGERS		FE	3					All audit requirements must be met.	



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FS4.4.003	4.4.003	ACCOUNTS PAYABLE LEDGERS		FE	3					All audit requirements must be met.	
FS4.4.004	4.4.004	EMPLOYEE SAVINGS BOND LEDGERS		FE	3					All audit requirements must be met.	
FS4.5.001	4.5.001	WORKSHEETS FOR PREPARING FISCAL REPORTS	ANNUAL FINANCIAL REPORT WORKPAPERS	FE	3					All audit requirements must be met.	
FS4.5.002	4.5.002	INTERNAL FISCAL MANAGEMENT REPORTS		FE	3					All audit requirements must be met.	
FS4.5.003	4.5.003	ANNUAL FINANCIAL REPORTS		AC	6			AC=September 1 of odd numbered calendar years.			
FS4.5.005	4.5.005	EXTERNAL FISCAL REPORTS		FE	3					All audit requirements must be met.	
FS4.5.006	4.5.006	ANNUAL OPERATING BUDGETS		FE	3					All audit requirements must be met.	
FS4.5.007	4.5.007	USAS REPORTS - DAILY		AC				AC=Receipt and reconciliation of monthly report.			
FS4.5.008	4.5.008	USAS REPORTS - MONTHLY		AC				AC=Receipt and reconciliation of annual report.			
FS4.5.009	4.5.009	USAS REPORTS - ANNUAL		FE	3					All audit requirements must be met.	



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FS4.6.001	4.6.001	BALANCING RECORDS		FE	3					All audit requirements must be met.	
FS4.6.002	4.6.002	ACCOUNT RECONCILIATIONS		FE	3					All audit requirements must be met.	
FS4.6.003	4.6.003	CASH COUNTS		FE	3					All audit requirements must be met.	
FS4.7	4.7	BANK COLLATERAL RECORDS		FE	3					All audit requirements must be met.	
FS4.7a	4.7	BOND DESTRUCTION CERTIFICATES		PM							
FS4.7.001	4.7.001	ACCOUNTING POLICIES AND PROCEDURES MANUAL		US	3						
FS4.7.002	4.7.002	BANK STATEMENTS		FE	3					All audit requirements must be met.	
FS4.7.003	4.7.003	RETURNED CHECKS/WARRANTS/DRAFTS (UNCOLLECTIBLES)		AC	3			AC=After deemed uncollectible.			
FS4.7.004	4.7.004	CAPITAL ASSET RECORDS		LA	3						
FS4.7.005	4.7.005	CLAIM FILES		AC	3			AC=Resolution of claim.			
FS4.7.006	4.7.006	COMPTROLLER STATEMENTS		FE	3					All audit requirements must be met.	



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FS4.7.007	4.7.007	DETAIL CHART OF ACCOUNTS		FE	3						
FS4.7.008	4.7.008	FEDERAL GRANT RECORDS		AC	3			AC-Satisfaction of all uniform administrative requirements for grants and cooperative agreements to state and local governments (The Common Rule).			
FS4.7.009	4.7.009	FIXED ASSET SEQUENTIAL NUMBER LOGS		US	3						
FS4.7.010	4.7.010	LONG-TERM LIABILITY RECORDS, BONDS, ETC.		AC	3			AC=Retirement of debt.			
FS4.7.011	4.7.011	TEXAS FACILITIES COMMISSION (TFC) STATEMENTS		FE	3					All audit requirements must be met.	
FS4.7.012	4.7.012	SIGNATURE AUTHORIZATIONS		AC	3			AC=US+FE			
SS5.1.001	5.1.001	CONTRACTS, LEASES, AND AFFILIATION AGREEMENTS	Executed, renewed, or amended on or after September 1, 2015.	AC	7			AC=Expiration or termination of the instrument according to its terms.			Government Code, 441.1855



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					Years	Months	Days				
SS5.1.001	5.1.001	CONTRACTS, LEASES, AND AFFILIATION AGREEMENTS	Executed, renewed, or amended on or before August 31, 2015.	AC	4			AC=Expiration or termination of the instrument according to its terms.			Government Code, 441.1855
SS5.1.003	5.1.003	DELIVERY AND RECEIVING REPORTS			2						
SS5.1.004	5.1.004	MAIL AND TELECOMMUNICATIONS LISTINGS		US							
SS5.1.005	5.1.005	POSTAGE RECORDS		FE	3						
SS5.1.007	5.1.007	PRINT SHOP JOB ORDERS		AV							
SS5.1.010	5.1.010	LICENSES AND PERMITS FOR NON-VEHICLES		AC	2			AC=Expiration date of license or permit.			
SS5.1.011	5.1.011	PHOTO COPIER USE LOGS/CHARGE DETAILS		US	3						
SS5.1.012	5.1.012	CHARGE SCHEDULES/PRICE LISTING		US	3						
SS5.1.013	5.1.013	INSURANCE POLICIES FOR VEHICLES & EQUIPMENT	Executed, renewed, or amended on or after September 1, 2015.	AC	7			AC=Expiration or termination of the policy according to its terms.			Government Code, 441.1855



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SS5.1.013a	5.1.013a	INSURANCE POLICIES FOR VEHICLES & EQUIPMENT	Executed, renewed, or amended on or before August 31, 2015.	AC	4			AC=Expiration or termination of the policy according to its terms.			Government Code, 441.1855
SS5.1.014	5.1.014	OFFICE POLICIES AND PROCEDURES MANUALS		US	1						
SS5.1.015	5.1.015	CORRESPONDENCE TRACKING SYSTEMS			1						
SS5.1.017	5.1.017	CONTRACT LOG		FE	3						
PP5.2	5.2	PHYSICAL PLANT MAINTENANCE RECORDS (IN HOUSE CONTRACTORS)			3						
PP5.2a	5.2	PHYSICAL PLANT MAINTENANCE RECORDS (OUTSIDE CONTRACTORS)			5						
PP5.2.001	5.2.001	APPRAISALS - BUILDING OR PROPERTY		AV					O		
PP5.2.002	5.2.002	BUILDING CONSTRUCTION PROJECT FILES		AC	10			AC=Completion of project.	O		



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PP5.2.003	5.2.003	BUILDING PLANS AND SPECIFICATIONS - UNIVERSITY OWNED		LA					O		
PP5.2.003a	5.2.003a	BUILDING PLANS AND SPECIFICATIONS - LEASED		AC	2			AC=Termination or cancellation of lease.			
PP5.2.004	5.2.004	BUILDING SPACE REQUESTS			1						
PP5.2.005	5.2.005	CALIBRATION RECORDS	(EQUIPMENT OR INSTRUMENT)		10						
PP5.2.006	5.2.006	PROPERTY DESTRUCTION CERTIFICATIONS		FE	3						
PP5.2.007	5.2.007	DAMAGE REPORTS TO STATE PROPERTY		FE	3						
PP5.2.008	5.2.008	EQUIPMENT HISTORY FILE/SERVICE AGREEMENTS		LA	3						
PP5.2.009	5.2.009	EQUIPMENT INVENTORY DETAIL REPORT FORMS		FE	3						
PP5.2.010	5.2.010	EQUIPMENT MANUALS		LA							
PP5.2.011	5.2.011	EQUIPMENT WARRANTIES		AC	1			AC=Expiration of warranty.			



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PP5.2.012	5.2.012	ESTIMATE FILES (SUPPLY AND REPAIR COST ESTIMATE)			1						
PP5.2.014	5.2.014	ANNUAL INVENTORY (PHYSICAL) REPORT		FE	3						
PP5.2.015	5.2.015	INVENTORY NOTICES OF EQUIPMENT MOVED		FE	3						
PP5.2.016	5.2.016	INVENTORY SYSTEM UPDATE LISTINGS		AC				AC=Transfer of information into annual list.			
PP5.2.017	5.2.017	LOST AND STOLEN PROPERTY REPORTS		FE	3						
PP5.2.018	5.2.018	QUALITY CONTROL REPORTS			2						
PP5.2.019	5.2.019	SERVICE ORDERS ON MECHANICAL EQUIPMENT			1						
PP5.2.020	5.2.020	SUPPLY USAGE RECORDS		FE	1						
PP5.2.021	5.2.021	SURPLUS PROPERTY/AUCTION REPORTS		FE	3						
PP5.2.022	5.2.022	UTILITY USAGE REPORTS		AV							
PP5.2.023	5.2.023	YEAR-TO-DATE ACTIVITY (INVENTORY LISTING)		FE	3						





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PP5.2.024	5.2.024	MATERIAL SPECIFICATIONS		AC	2			AC=Material is no longer in the University.			
PP5.2.025	5.2.025	EQUIPMENT DESCRIPTIONS AND SPECIFICATIONS		AC	2			AC=Equipment is no longer in the University.			
PP5.2.026	5.2.026	FACILITIES RESERVATION LOG/DATABASE			2						
PP5.2.027	5.2.027	SPACE UTILIZATION REPORTS		AV							
PP5.2.028	5.2.028	BUILDING CONSTRUCTION CONTRACTS/INSPECTION RECORDS		LA	11				O		
PU5.3.002	5.3.002	FREIGHT BILLS PAID		FE	3						
PU5.3.003	5.3.003	FREIGHT CLAIMS		AC	2			AC=Resolution of claim.			
PU5.3.004	5.3.004	CONFIRMATION ORDERS/APPROVED PURCHASE ORDER		AV							
PU5.3.005	5.3.005	PACKING SLIPS		AV							



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					Years	Months	Days				
PU5.3.007	5.3.007	BID DOCUMENTATION - REQUISITIONS, BIDS, ETC.	Includes bid requisition/authorizations, invitations to bid or propose, bid specifications, successful and unsuccessful 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.			
PU5.3.007a	5.3.007a	BID DOCUMENTATION - REQUISITIONS, BIDS, ETC.	Includes bid requisition/authorizations, invitations to bid or propose, bid specifications, successful and unsuccessful bids, and bid tabulation/evaluations. Associated with a contract executed, renewed, or amended on or before August 31, 2015.	FE	3						



STATE OF TEXAS  
Records Retention Schedule

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Retention Codes (field 7)

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

FE – Fiscal year end  
LA – Life of Asset  
PM – Permanent  
US – Until Superseded

Archival Codes (Field 10)

A/I – Transfer to State/University Archivist  
R/O – Review by State/University Archivist

1. Agency Code: 750		2. Agency Name: THE UNIVERSITY OF TEXAS AT TYLER									
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				
PU5.3.007b	5.3.007b	BID DOCUMENTATION - REQUISITIONS, BIDS, ETC.	Includes bid requisition/authorizations, invitations to bid or propose, bid specifications, successful and unsuccessful bids, and bid tabulation/evaluations. Unsuccessful bids that do not meet agency submission requirements and are not included in bid evaluation process (e.e. withdrawn, missed submission deadline, incomplete submission, etc.).	AC	2			AC=Date of notification of denial or date of withdrawal, as applicable.			
PU5.3.008	5.3.008	PURCHASING LOGS		FE	3						
PU5.3.009	5.3.009	REQUESTS FOR INFORMATION		AC				AC=Date of direct purchase, issuance of request for bids, or decision not to proceed with the procurement, as applicable.			
EH5.4.001	5.4.001	ACCIDENT REPORTS AND ASSOCIATED DOCUMENTS		CE	5					The Texas Department of Insurance retains copies of the reports submitted to it for 50 years.	29 CFR 1904.33
EH5.4.002	5.4.002	EVACUATION PLANS		US							



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					Years	Months	Days				
EH5.4.003	5.4.003	INSPECTION RECORDS (FIRE, SAFETY, ETC.)		AC	3			AC=Date of correction of the deficiency if the inspection report revealed a deficiency.			
EH5.4.004	5.4.004	FIRE ORDERS/DRILL REPORTS		AC	3			AC=Deficiency corrected.			
EH5.4.007	5.4.007	HAZARDOUS MATERIAL TRAINING RECORDS			5						Health and Safety Codes 502.009(g).
EH5.4.008	5.4.008	HAZARD COMMUNICATION PLANS		US	5						Health and Safety Codes 502.009(g).
EH5.4.009	5.4.009	WORKPLACE CHEMICAL LISTS			30						Health and Safety Codes 502.009(d).
EH5.4.010	5.4.010	SAFETY DATA SHEETS		AC	30			AC=After sheets are updated or hazardous chemical no longer stored by the University, as applicable.			
EH5.4.011	5.4.011	VISITOR CONTROL REGISTERS			3						



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**Records Retention Schedule**

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					Years	Months	Days				
EH5.4.012	5.4.012	SECURITY ACCESS RECORDS		AC	2			AC=Until superseded, date of expiration or date of termination, whichever sooner.			
EH5.4.013	5.4.013	DISASTER PREPAREDNESS AND RECOVERY PLANS		US							
TC5.5	5.5	COMMUNICATION TAPES AND PRINTOUTS	(INCOMING AND OUTGOING COMMUNICATIONS)	AC		3		AC=After completion of tape.			
TC5.5.001	5.5.001	BILLING DETAILS (NOT TEX-AN)		FE	3						
TC5.5.002	5.5.002	LONG DISTANCE TELEPHONE LOGS		AV							
TC5.5.003	5.5.003	STATION ACTIVITY REPORTS		AV							
TC5.5.004	5.5.004	SYSTEM ACTIVITY REPORTS		AV							
TC5.5.006	5.5.006	BILLING DETAIL (TEX-AN)		FE	3						
TC5.5.007	5.5.007	DISPUTED CALL DOCUMENTATION		FE	3						
PP5.6.003	5.6.003	INSPECTION REPAIR AND MAINTENANCE RECORDS		LA	1						

