



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 US – Until Superseded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: 710			2. Agency Name: Texas A&M System Office (TAMUS)								
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				
01.100.10	1.1.002	Audits	Audits and reviews performed by or on behalf of an agency, including the working papers that support the audit. Also includes audits performed on the agency audits	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.	
01.100.20		Compliance Program Records	Records documenting TAMUS/System Member compliance activities.	AC				AC=Retain the longer of applicable federal or state laws or regulations, TAMUS requirements, or administrative value.		Note: This applies to compliance program records not covered by another records series.	
01.100.30		Civil Rights Complaint Records	Records related to the receipt, investigation, and resolution of a complaint alleging the violation of an individual's civil rights.	AC	3			AC=Final disposition of the complaint or longer as required by state or federal law.		Note: Employee or student disciplinary records arising from the complaint should be retained in accordance with the applicable retention periods (for employees, see Agency Item Nos. 03.109.10 or 03.110.10; for students, see Agency Item No. 06.218.10). This item also does not include a complaint filed with an external enforcement agency, follow Item No. 1.1.048.	



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01.101.10	1.1.004	Legislative Appropriations Requests	Including any supporting documentation created and/or used to justify and support legislative appropriations requests by an agency.	AC	6			AC = September 1 of odd-numbered calendar years.	I	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.	
01.102.10	1.1.006	Complaint File	Complaints received by an agency from the public concerning the agency and records pertaining to the resolution of the complaint.	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. This item does not include civil rights complaint records, see Agency Item No. 01.100.30.	



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01.103.10	1.1.007	Correspondence - Administrative	Incoming/outgoing and internal correspondence, in any format, pertaining to the formulation, planning, implementation, interpretation, modification, or redefinition of the programs, services, or projects of an agency and the administration of policies, procedures and programs that govern them.		4				O	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. Should be considered for retention in archives. 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 1.1.010	



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01.104.10	1.1.008	Correspondence - General	Non-administrative incoming/outgoing and internal correspondence, in any media, pertaining to or arising from the routine operations of the policies, programs, services, or projects of an agency. (includes interoffice correspondence; excludes directories)		2					SEE comments to item number 1.1.007. SEE ALSO item number 1.1.010	
01.105.10	1.1.010	Directives	Routine issuances on general office procedures	US	1						
01.106.10	1.1.011	Executive Orders	Any document that initiates, rescinds, or amends a regulation, policy, or procedure that governs the programs, services, or projects of an agency.	US	3				I		



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01.107.10	1.1.013	Calendars, Appointments and Itinerary Records	Desk calendars, appointment books, and similar records, purchased with state funds that documents appointments, itineraries, and other activities of an agency official or employee.	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 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 the retention period. See Open Records Decision 635 issued in December 1995 by the Attorney General.	



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01.108.10	1.1.014	Legal Opinions and Advice	From agency legal counsel or the Attorney General including request eliciting the opinions	AV					O	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	
01.109.10	1.1.019	Public Relations Records	News or press releases issued by the agency. Includes print, electronic, audio, and audiovisual		2				O		
01.110.10	1.1.020	Public Information Requests, Requested information disclosed	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	2			AC=Date Request Fulfilled		NOTE: If a portion of the records are withheld from disclosure, item no. 1.1.021 applies instead of this records series.	



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01.111.10	1.1.021	Public Information Requests, Requested information withheld	Includes all correspondence and documentation relating to requests for records that are excepted from disclosure or confidential under Public Information Act (Chapter 552, Government Code).	AC	2			AC = The latest of the following dates, as applicable; the date of the institution's or agency's receipt of the office of the attorney general's decision that records are excepted from disclosure or confidential, or if an attorney general decision is not required, the date the records are determined to be excepted from disclosure or confidential, or the date the institution or agency provides to the requestor the portion of the records that are not excepted from disclosure or confidential.			
01.112.10	1.1.023	Organization Charts		US					I		



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01.113.10	1.1.024	Plans and Planning Records	Plans and records relating to the process of planning new or redefined programs, services or projects of an agency that are not included in or directly related to other records series in this schedule.	AC	3			AC=Decision made to implement or not to implement result of planning process	O	ARCHIVES NOTE: Data processing planning records are not archival.	
01.114.10	1.1.026	Texas Register Submissions	Copies of all proposed, withdrawn, emergency, and adopted rules; open meeting notices; or any other documents required by law to be submitted to the Texas Register.	AC	1			AC=Date of publication in the Texas Register			
01.115.10	1.1.027	Proposed Legislation	Drafts of proposed legislation and related correspondence.	AV							
01.116.10	1.1.038	Customer Surveys	Surveys returned by the customers or clients of an agency, and the statistical data maintained rating an agency's performance.	AC				AC = Final disposition of summary report			
01.117.10	1.1.040	Speeches, Papers and Presentations	Notes or text of papers, presentations, or reports delivered in conjunction with agency work.	AC				AC = End of term in office or service in a state position.	O		
01.118.10	1.1.041	Suggestion System	Suggestions submitted by agency personnel and responses.		1						



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01.119.10	1.1.043	Training Manuals	Instructional materials developed by an agency for training entities or individuals it regulates or serves.	US	1						
01.120.10	1.1.048	Litigation Files	Records created by or on behalf of an agency in anticipation of or in the adjudication of a lawsuit.	AC	1			AC=As applicable, decision of an agency not to file a lawsuit or decision that a lawsuit will not be filed against it on a matter; dismissal of a lawsuit for want of prosecution or on motion of the plaintiff; or final decision of a court (or of a court on appeal, if applicable) in a lawsuit.	O	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.	
01.120.20		Liability Waivers		AC	1			AC = Expiration of the applicable statute of limitations.	O	For example, the limitations period for a personal injury suit is generally two years from the date of the injury or death.	
01.121.10	1.1.053	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 = Report filed with the Texas Ethics Commission.			



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01.122.10	1.1.055	Strategic Plans	Includes information resources and operational strategic plans prepared in accordance with Tex. Govt. Code, §§ 2054.095 and 2056.002.	AC	6			AC = September 1 of odd-numbered calendar years	I	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.	
01.123.10	1.1.056	ADA (American with Disabilities Act Documentation	Self evaluations and plans documenting compliance with Americans With Disabilities Act.		3						28 Code of Federal Regulations (CFR) § 35.105 (c)



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01.124.10	1.1.057	Transitory Information	Records of temporary usefulness that are not an integral part of a records series of an agency, that are not regularly filed within an agency's recordkeeping system, and that are required only for a limited period of time for the completion of an action by an official or employee of the agency or in the preparation of an on-going records series. Transitory records are not essential to the fulfillment of statutory obligations or to the documentation of agency functions. Some examples of transitory information, which can be in any medium (voice mail, fax, email, hard copy, etc.) are routine messages; internal meeting notices; routing slips; incoming letters; telephone messages; or memoranda of transmittal that add nothing of substance to enclosures; and similar routine information used for communication, but not for the documentation, of a specific agency transaction.	AC				AC=Purpose of record has been fulfilled.		CAUTION: Records management officers should use caution in assigning this records series item number to records of an agency to make certain they are not part of another records series listed in this schedule or, for records series unique to an agency, are not part of a records series that documents the fulfillment of the statutory obligations of the agency or the documentation of its functions. The disposal of transitory information need not be documented through destruction sign-offs (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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01.125.10	1.1.058	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					I	ARCHIVES NOTE: Agency retains permanent record copy. The archival requirement will be met by sending a copy to the Archives and Information Services Division, Texas State Library and Archives Commission. CAUTION: This records series and 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.	



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01.126.10	1.1.059	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 = The data 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.	
01.127.10	1.1.060	Meetings, Audio and Videotapes of Open	Audio or videotapes of open meetings of state boards, commissions, committees, etc.	AC			90	AC = Official Approval of written minutes of the meeting by 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.	
01.128.10	1.1.061	Meeting Notes	Notes taken during open meetings of state boards, commissions, committees, and councils from which written minutes are prepared.	AC			90	AC = Approval of the formal minutes by the governing body.		SEE caution comment at item number 1.1.058.	



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01.129.10	1.1.062	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				I	SEE caution comment at item number 1.1.058.	
01.130.10	1.1.063	Staff Meeting Minutes/Notes	Minutes or notes, and supporting documentation taken at internal agency staff meetings		1						
01.131.10	1.1.064	Agency Performance Measure 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					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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01.132.10	1.1.065	Reports and Studies (Non-Fiscal) - Raw Data	Information or data collected and compiled for the purpose of producing non-fiscal reports.	AV						CAUTION: Does not include source documentation used for information or data included in or directly related to another records series in this schedule. SEE especially item number 1.1.064.	
01.133.10	1.1.066	Reports, Annual and Biennial 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=September 1st of odd-numbered calendar years	I	Agency retains the Record Copy and sends required copies to the Publications Depository Program	
01.134.10	1.1.067	Reports and Studies (Non-fiscal)	Annual, sub-annual, or special reports or studies on non-fiscal aspects of an agency's programs, services, or projects 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				O		



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01.135.10	1.1.068	Reports on Performance Measures	Quarterly and annual reports on agency performance measures submitted to executive and legislative offices	AC	6			AC=September 1st of odd-numbered calendar years			
01.136.10	1.1.069	Activity Reports	Reports compiled by agency personnel on a daily or other periodic basis pertaining to workload monitoring, task completion times, number of public contacts, and similar activities.		1					CAUTION: SEE item number 1.1.064.	
01.137.10	1.1.070	Agency Rules, Policies, and Procedures - Final	Manuals, guidelines, administrative rules, or similar records distributed internally for the use of employees or externally to the public or those individuals or entities regulated by an agency that sets out the rules, policies, and procedures that govern an agency's programs, services, or projects.	AC	3			AC = Completion or termination of programs, rules, policies or procedures.	O	SEE ALSO: Agency Rules, Policies and Procedures - Working Files, item number 1.1.071	



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01.138.10	1.1.071	Agency Rules, Policies, and Procedures - Working Files	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 = Completion or termination of programs, rules, policies or procedures.	O	See also item number 1.1.070	
01.139.10	1.1.072	Public Information Reports	Reports made to the Office of the Attorney General on an agency's Public Information Act activities.		2						
01.140.10	1.1.073	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 = Last action.	O	Note: This applies only to TAMUS agencies with regulatory functions.	
01.141.10	1.1.074	Sunset Review Report and Documentation		AC	3			AC = After the subsequent Sunset Review	O		



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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				
01.142.10	1.1.075	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 = Date of final agreement.			Tex. Civ. Prac. and Rem. Code, § 154.071
01.143.10		Patents and Related Documents		AC	20			AC = Date patent is issued.		CAUTION: If multiple patents are subject to the same license agreement, retain for the longer of the retention period, the termination or expiration of the license agreement, or the latest expiring patent.	
01.143.20		Intellectual Property Agreements	Includes license agreements, know-how agreements, and other contractual agreements resulting from the licensing of intellectual property or the transfer of intellectual property.	AC	7			AC = Termination or expiration of the agreement according to its terms.	O	CAUTION: Does not include patent records. See Agency Item # 01.143.10.	OMB Circular A-110.53 authorized by 31 U.S.C. 503, 31 U.S.C. 1111, 41 U.S.C. 405, and E.O. 11541.



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Retention Codes (field 7)

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01.143.30		Miscellaneous Intellectual Property Records	Intellectual property records not covered by Agency Item # 01.143.10 or 01.143.20.		20					Includes disclosures of intellectual property where there was no protection sought or was denied by governmental authority in the relevant country.	
01.144.10		Organizational Memberships		AV							
01.145.10		Gift and Donor Records		PM							
01.200.10	1.2.001	Destruction Authorizations	Agency level documents authorizing final disposition of records under a certified records retention schedule	FE	3						
01.201.10	1.2.003	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=Discontinue use of forms			
01.202.10	1.2.004	Forms Inventory	Any periodic listing of all forms used internally or externally by an agency	US							
01.203.10	1.2.005	Records Retention Schedule (Agency copy)	Includes documentation of certification and approval - forms SLR 105C and/or other forms designated by the State Records Administrator.	US						Original is retained permanently by SLRMD of Texas State Library. Record copy retained by Records Management Officer.	



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01.204.10	1.2.006	Records Transmittal Forms (Agency Copy)	Forms indicate records transferred to storage or a transfer of legal custody.	AC	2			AC=Date of authorization for destruction, permanent transfer from storage, or transfer to the Archives and Information Services Division, Texas State Library and Archives Commission, by the agency records administrator.			
01.205.10	1.2.008	Request for Authority to Dispose of State Records	Agency copy of requests seeking authority from Texas State Library and Archives Commission for the final disposition of state records NOT under a certified records retention schedule.	FE	3					Original is retained by the Texas State Library and Archives Commission.	
01.206.10	1.2.010	Records Disposition Logs	Logs or similar records listing records destroyed or transferred to TAMUS system member archives.		10					CAUTION: This item does not include records covered by Agency Item # 01.200.10 or 01.205.10.	
01.207.10	1.2.012	Records Inventory Worksheets		US							
01.208.10	1.2.013	Records Control Locator Aids	Includes indexes, card files, shelf lists, registers, guides, etc.	AC				AC = When control aid is updated, revised, or no longer needed.			



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01.209.10	1.2.014	Records Management Plan		US	1						
01.210.10	1.2.015	Disaster Recovery Service Transmittals (RMD 109)	Also includes documentation for disaster recovery services provided by other entities	FE	1					See Also 5.4.013	
01.211.10	1.2.016	Disaster Recovery Service Approval Form (RMD 113)	Agency Copy of Form	AC				AC=Until superseded or termination of service.			



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01.300.10	1.3.001	State Publications	One copy of each state publication except a publication that is subject to a different retention period in this schedule.	AC	2			AC=Until Superseded or obsolete.	O	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. For those publications meant to be distributed in a first published version without subsequent revision, the date decision is made within an agency to no longer make the publication available for distribution. For serial publications issued in successive parts bearing numerical or chronological designations (e.g., newsletters, annual statistical reports of regulated activities), from the date of release of the next part in the series.	



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01.301.10	1.3.002	Publication Files	Background material, copy (drafts), original artwork, photo negatives, prints, flats, etc. This includes all work performed both inside and outside the agency.	AV					O		
01.400.10		Accreditation Records	This series documents the accreditation process for the colleges, units, and related programs. The series provides a record of materials compiled for inclusion in a report packet sent to the appropriate professional accreditation board for the specific program or service and usually includes statements on mission, finance, educational programs and departments/divisions make up. Most accreditation organizations produce an	PM					O		



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1.400.20		Accreditation Records-Working File	This series documents the accreditation process for the colleges, units, and related programs. The series provides a record of materials compiled for inclusion in a report packet sent to the appropriate professional accreditation board for the specific program or service and usually includes statements on mission, finance, educational programs and departments/divisions make up. Most	AC				AC=End of 2 accreditation cycles.			
01.401.10		Completed Class Tests and Examinations, Students' Course Papers		AC	1			AC=Academic term			
01.402.10		Course Syllabus/Outlines Files		AV						CAUTION: If record copy of syllabus is posted electronically on institution website in accordance with Texas Education Code § 51.974, retain at least 2 years.	
01.403.10		Curriculum Files, Including Revisions, Central Administrative		US	5					Review before disposal as some may merit permanent retention for historical reasons.	



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01.404.10		Curriculum Files, including Revisions, Departmental		US	5						
01.405.10		Instructor/Faculty Evaluations	Student evaluations of instructors/faculty.	AC	1			AC=Academic term			
01.406.10		Instructor Grade Books		AC	1			AC=Academic term			
01.407.10		Instructor Grade Sheets		AC	1			AC=Academic term			
01.409.10		New Course Proposals File, Central Administrative		AV							
01.410.10		New Course Proposals File, Departmental		AV							
02.100.10	2.1.001	Processing Files	Machine-readable files used in the creation, utilization, and updating of master files.	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: Be certain before assigning the retention period of AC to automated processing files that the files do not fall under records series listed elsewhere.	