

## **Records Retention Schedule**

SLR 105 Rev. 2017-07

#### Retention Codes (field 7) AC - See field 9 for specific records FE - Fiscal year end series definition AV – Administratively valuable CE – Calendar year end

1. Agency	Code: 71	0	2. Agency Name: Texas A&M System Office	e (TA	MUS	)					
3.		5.	6.		8. Retent	tion Per	iod	9.		11.	12.
Agency	Record Series			Ret. Code	Years	Months	Days		. Archival		
Item No.	Item No.	Record Series Title	Description	7.1		~		AC Definition	10.	Remarks	Legal Citations
		Contracts and Leases	Contracts, leases, and agreements include general obligation, land lease, utilities, and construction except for buildings. Documents include specifications, affidavits of publication of calls for bids, performance bonds, contracts, purchase orders, inspection reports, <u>Executed, renewed, or amended on or</u> <u>after September 1, 2015.</u>		7			AC=Expiration or termination of the instrument according to its terms.			Tex. Gov't Code



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1. Agency (	Code: 71	0	2. Agency Name: Texas A&M System Office	e (TA	MUS)						
3.	4.	5.	6.		8. Retent	ion Per	iod	9.		11.	12.
Agency Item No.	Record Series Item No.	Record Series Title	Description	7. Ret. Code	Years	Months	Days	AC Definition	10. Archival	Remarks	Legal Citations
05.100.20	5.1.001	Contracts and Leases	Contracts, leases, and agreements include general obligation, land lease, utilities, and construction except for buildings. Documents include specifications, affidavits of publication of calls for bids, performance bonds, contracts, purchase orders, inspeand correspondence. May also include other applicable documentation in the master contract file per Texas Comptroller of Public Accounts Contract Management Guide. <u>Executed,</u> <u>renewed, or amended on or before August</u> <u>31, 2015.</u>	AC	4			AC=Expiration or termination of the instrument according to its terms.		See related item numbers 3.1.035 Performance Bonds and 5.3.007 Bid Documentation. See item number 5.2.028 for building construction contracts and item number 5.1.017 for contract logs. Does not include research agreements. See Agency Item #. 07.101.20.	Tex. Gov't Code 441.1855.
05.101.10	5.1.003	Delivery Reports			2						
05.102.10		Mailing and Telecommunications Listings	Any mailing address, telephone or fax number, or e-mail address records maintained by an agency on its employees or on entities or persons it serves.	US							
05.103.10	5.1.005	Postage Records	Records and reports of postage expenses, including postage meter use	FE	3					Includes express delivery and campus post offices.	

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1. Agency (	Code: 71	0	2. Agency Name: Texas A&M System Office	e (TA	MUS)	)					
3.	4.	5.	6.		8. Retent	tion Per	iod	9.		11.	12.
Agency Item No.	Record Series Item No.	Record Series Title	Description	7. Ret. Code	Years	Months	Days	AC Definition	10. Archival	Remarks	Legal Citations
	5.1.007	Requisitions for In-House Copy/Inter- Agency/Printing Service	Includes word processing and data processing	AV							
05.105.10		Licenses & Permits for Non- Vehicles	Does not include licenses and permits issued by an agency as part of its statutory responsibilities.	AC	2			AC = Expiration date of license or permit.			
05.106.10	5.1.011	Photocopier and Telefax Use Logs & Reports		AV							
05.107.10		Charge Schedules/Price Lists	Schedules of prices charged by an agency for services to the public or other agencies, including any documentation used to determine the charges.	US	3						
05.108.10	5.1.013	Insurance Policies	For vehicles, equipment, etc. Executed, renewed, or amended on or after September 1, 2015.	AC	7			AC=Expiration or termination of the policy according to its terms			Tex. Gov't Code 441.1855
05.108.20	5.1.013	Insurance Policies	For vehicles, equipment, etc. Executed, renewed, or amended on or before August 31, 2015.	AC	4			AC=Expiration or termination of the policy according to its terms			Tex. Gov't Code 441.1855



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1. Agency C	Code: 710	0	2. Agency Name: Texas A&M System Office	e (TA	MUS)						
3.	4.	5.	6.		8. Retent	ion Peri	od	9.		11.	12.
0,	Record Series Item No.	Record Series Title	Description	7. Ret. Code	Years	Months	Days	AC Definition	10. Archival	Remarks	Legal Citations
05.109.10	5.1.014	Office Procedures	Any internally distributed manual, guidelines, or similar records that establish standard office procedures for an agency; for example, agency style manuals, telephone protocols, mail room procedures, print shop and photocopy ordering instructions.	US	1						
05.110.10		Correspondence Tracking Records	Any record created by an agency to track any type of incoming and outgoing correspondence or packages by the U.S. Postal Service or by private couriers.		1						
05.111.10	5.1.017	Contract Log	List of agency contracts, leases, and agreements including general obligation, land lease, utilities, and construction contracts.	FE	3						
05.200.10		Appraisals - Building or Property		AV					0		
05.201.10		Building Construction Project Files	Planning, design, and constrution records; accepted and rejected bids; correspondence; etc.	AC	10			AC=Completion of project.	0	See also item numbers 5.2.003 and 5.2.028.	
05.202.10		Building Plans & Specifications - Leased	Includes architectural and engineering drawings, profiles and blueprints.	AC	2			AC=Termination or cancellation of lease		See also item numbers 5.2.002 and 5.2.028.	



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1. Agency (	Code: 710	)	2. Agency Name: Texas A&M System Office	e (TA	MUS	)					
3.	4.	5.	6.		8. Reten	tion Per	iod	9.		11.	12.
<b>U U</b>	Record Series Item No.	Record Series Title	Description	7. Ret. Code	Years	Months	Days	AC Definition	10. Archival	Remarks	Legal Citations
05.203.10		Building Plans & Specifications - State- Owned	Includes architectural and engineering drawings, profiles and blueprints.	LA					0	See also item numbers 5.2.002 and 5.2.028. ARCHIVES NOTE: Archival review designation is for state- owned buildings only.	
05.204.10	5.2.004	Building Space Requests			1						
05.205.10		Calibration Records (Equipment or Instrument)			10						
05.206.10		Certificate of Destruction of Property		FE	3						
05.207.10	5.2.007	Damage Reports		FE	3						
		Equipment History File	Includes requests for installation, moves, service, etc.; and service/repairs logbooks, etc.	LA	3					Includes IT hardware/software maintenance records. For service agreements or contracts related to equipment repairs and service, retain in accordance with item number 5.1.001.	
05.209.10		Equipment Inventory Detail Report Form	Updates agency portion of the inventory listing and adds, changes, transfers, or deletes items from inventory.	FE	3						



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3.	4.	5.	6.		8. Retent	ion Peri	iod	9.		11.	12.
Agency Item No.	Record Series Item No.	Record Series Title	Description	7. Ret. Code	Years	Months	Days	AC Definition	10. Archival	Remarks	Legal Citations
		Equipment Manuals		LA							
05.211.10		Equipment Warranties		AC	1			AC = Expiration of Warranty.			
05.212.10		Estimate Files (Supply & Repair Cost Estimates)			1						
05.213.10	5.2.014	Inventory - Annual Physical		FE	3						
05.214.10		Notice of Equipment Removed From Inventory		FE	3						
05.215.10		Inventory System Update Listing	Listing shows all additions, changes, deletions, and transfer times for the monthly processing period.	AC				AC=until transfer of information onto annual listing			
05.216.10		Lost and Stolen Property Report		FE	3						
05.217.10	5.2.018	Quality Control Reports			2						
05.218.10	5.2.019	Service Orders	Agency copy of forms completed by mechanical service personnel for installation or repair. Includes billing code, service, labor, parts, and remarks.		1						
05.219.10	5.2.020	Supply Usage Records		FE	1						
05.220.10	5.2.021	Surplus Property Sale		FE	3						



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1. Agency (	Code: 71	0	2. Agency Name: Texas A&M System Offic	e (TA	MUS	)				
3.	4.	5.	6.		8. Retent	tion Per	iod	9.	11.	12.
Item No.		Record Series Title	Description	× 7. Ret. Code	Years	Months	Days	AC Definition	Remarks	Legal Citations
05.221.10	5.2.022	Utility Reports		AV					Includes Energy Management Reports	
05.222.10	5.2.023	Year-to-Date Activity (Inventory Listing)	Shows additions, changes, transfers, and deletions of information within the inventory system. Data include agency, division, tag number, batch, document, transaction date, location, item code, description, date, and cost.	FE	3					
05.223.10	5.2.024	Material Specifications		AC	2			AC = Material is no longer in the agency.		
05.224.10	5.2.025	Equipment Descriptions and Specifications		AC	2			AC = Equipment is no longer in the agency.		
05.225.10	5.2.026	Facilities Reservation Logs			2				From date of event.	
05.226.10	5.2.027	Space Utilization Reports		AV						
05.227.10	5.2.028	Building Construction Contract & Inspection Records	Building construction contracts, surety bonds, and inspection records	LA	10				See also item numbers 5.2.002 and 5.2.003	
05.229.10		Facilities Inventory		LA	2					
		Freight Bills Paid		FE	3					
05.301.10	5.3.003	Freight Claims		AC	2			AC=Resolution of claim		

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1. Agency	Code: 71	0	2. Agency Name: Texas A&M System Offic	e (TA	MUS	)					
3.	4.	5.	6.		8. Retent	tion Pe	eriod	9.		11.	12.
Agency Item No.	Record Series Item No.	Record Series Title	Description	7. Ret. Code	Years	Months		AC Definition	10. Archival	Remarks	Legal Citations
05.302.10	1			AV							
		Packing Slips Bid Documentation	Includes bid requisitions/authorizations, invitations to bid or propose, bid specifications, successful and unsuccessful bids, and bid tabulations/evaluations. <u>Associated with a contract executed,</u> <u>renewed, or amended on or after</u> <u>September 1, 2015.</u>	AV	7			AC=Expiration or termination of the instrument according to its terms of decision not to proceed with the bid.			Tex. Gov't Code 441.1855.
05.304.20	5.3.007	Bid Documentation	Includes bid requisitions/authorizations, invitations to bid or propose, bid specifications, successful and unsuccessful bids, and bid tabulations/evaluations. <u>Associated with a contract executed,</u> renewed, or amended on or before August <u>31, 2015.</u>		3						



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LA – Life of Asset PM – Permanent US – Until Superseded

1. Agency (	Code: 710	0	2. Agency Name: Texas A&M System Office	e (TA	MUS	)					
3.	4.	5.	6.		8. Reten	tion Per	iod	9.		11.	12.
Agency Item No.	Record Series Item No.	Record Series Title	Description	7. Ret. Code	Years	Months	Days	AC Definition	10. Archival	Remarks	Legal Citations
		Bid Documentation	Includes bid requisitions/authorizations, invitations to bid or propose, bid specifications, successful and unsuccessful bids, and bid tabulations/evaluations. <u>Unsuccessful bids that do not meet agency</u> <u>submission requirements and are not</u> <u>included in bid evaluation process (e.g.</u> <u>withdrawn, missed submission deadline,</u> <u>incomplete submission, etc.).</u>	AC	2			AC= Date of notification of denial or date of withdrawal, as applicable.			
05.305.10	5.3.008	Purchasing Logs	Log, register, etc., providing a record of purchase orders issued, orders received, and similar data on procurement status.	FE	3						
05.306.10	5.3.009	Requests for Information	Requests for information preliminary to the procurement of goods or services by direct purchase or bid.	AC				AC=Decision not to proceed with the procurement.		CAUTION: If the request for information leads to request for proposal or bid, the request for information should be retained in accordance with item number 5.3.007.	



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3.	4.	5.	6.		8. Retent	ion Peri	od	9.		11.	12.
Agency Item No.	Record Series Item No.	Record Series Title	Description	7. Ret. Code	Years	Months	Days	AC Definition	10. Archival	Remarks	Legal Citations
05.400.10		Associated Documentation	Accident or occupational disease reports (by supervisors and employees) and other associated reports required to be submitted to the Texas Department of Insurance or its predecessors or maintained internally on accident frequency.	CE	5					The Texas Department of Insurance retains copies of the reports submitted to it for 50 years.	29 CFR 1904.33.
05.401.10		Workers' Compensation Claim Files		AC				AC=Death of Claimant.		Files maintained by System Workers' Compensation Office. The Texas Department of Insurance's copy is retained an additional 50 years.	
05.402.10	5.4.002	Evacuation Plans		US							
05.403.10	5.4.003		Fire, safety, and other inspection records of facilities and equipment.	AC	3			AC=Inspection or date of the Correction of the Deficiency, if the Inspection Report Reveals a Deficiency.		CAUTION: Does not include inspection reports of building construction. See item number 5.2.028.	
05.404.10	5.4.004		Issued by Fire Marshal to correct fire code deficiencies.	AC	3			AC=Deficiency corrected			
05.405.10		Hazardous Materials Training Records			5						Texas Health and Safety Code §502.009(g)

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3.	4.	5.	6.		8. Retent	ion Per	riod	9.		11.	12.
Agency Item No.	Record Series Item No.	Record Series Title	Description	7. Ret. Code	Years	Months	Days	AC Definition	10. Archival	Remarks	Legal Citations
05.406.10	5.4.008	Hazard Communication Plans		US	5						Texas Health and Safety Code §502.009(g)
05.407.10	5.4.009	Workplace Chemical Lists			30						Texas Health and Safety Code §502.005 (d)
05.408.10	5.4.010	Material Safety Data Sheets		AC				AC = After sheets are updated or hazardous chemical no longer stored by agency, as applicable			
05.409.10	5.4.011	Visitor Control Registers	Logs, registers, or similar records documenting visitors to limited access or restricted areas of facilities.		3						
05.410.10	5.4.012	Security Access Records	Records relating to the issuance of keys, identification cards, building passes, passwords, signed statements or similar instructions of access to agency facilities, equipment or automated systems.	AC	2			AC=Until superseded, date of expiration, or date of termination, whichever sooner			
05.411.10	5.4.013	Disaster Preparedness and Recovery Plan		US							
05.500.10	5.5.001	Telecommunication (Other	In addition to summary detail, includes any accompanying detailed listing of long distance calls.	FE	3					See item number 5.5.006 for TEX- AN billing detail.	



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3.	4.	5.	6.		8. Retent	ion Peri	od	9.		11.	12.
Agency	Record Series Item No.	Record Series Title	Description	7. Ret. Code	Years	Months	Days	AC Definition	10. Archival	Remarks	Legal Citations
05.501.10		Long Distance Telephone Log (includes Wire Transfers)	Long distance logs created by departments for internal documentation purposes. Includes any similar logs created for long distance facsimile or electronic transmissions.	AV							
05.502.10	5.5.003	Station Activity Reports	Internal listing of incoming/ outgoing telephone activity to individual telephone stations.	AV							
05.503.10	5.5.004	System Activity Reports	Internal listing of all incoming/outgoing agency telephone activity.	AV							
05.504.10		Billing Detail - Telecommunications (TEX- AN)	Applies only to TEX-AN billing detail received by an agency from the GSC BEFORE June 1, 1994. Includes any accompanying detailed listing of long distance calls. See 5.5.001 for billing detail from carriers other than TEX-AN.	FE	3					See item number 5.5.001 for billing detail from carriers other than TEX- AN.	
05.505.10		Disputed Call Documentation	Documentation relating to disputed long distance calls, including documents evidencing repayment by employees for personal long distance use.	FE	3						

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3.	4.	5.	6.		8. Retent	ion Peri	iod	9.		11.	12.			
0 /	Record Series Item No.	Record Series Title	Description	7. Ret. Code	Years	Months	Days	AC Definition	10. Archival	Remarks	Legal Citations			
05.600.10		Airplane Flight Logs (State- owned)		LA	3					Includes similar records for vessels, if applicable.				
05.600.20	5.6.001	Airplane Flight Logs (Leased)		FE	3					Includes similar records for vessels, If applicable.				
05.601.10	5.6.002	Airplane Passenger Lists		FE	3					Includes similar records for vessels, if applicable.				
05.602.10		Inspection Repair & Maintenance Records - Vehicles		LA	1					For TAMUS aircraft, maintained in Aircraft Log Books which remain in aircraft. Copies are maintained with vouchers. Includes similar records for vessels, if applicable.				
05.603.10	5.6.004	License and Driving Record Check		AC				AC = Until superseded or until termination of employment						
05.604.10	5.6.005	Vehicle Use Reports	Includes mileage, fuel/oil consumption, passengers carried and other related operational information.	FE	3					For TAMUS aircraft, maintained in combined form with the Airplane Passenger Lists and Mileage Report. Includes similar records for vessels, if applicable.				
05.605.10	5.6.007	Vehicle Titles and Registrations		LA						Includes similar records for vessels, if applicable.				

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3.	4.	5.	6.			tion Pe	riod	9.		11.	12.
Agency Item No. 05.606.10		Record Series Title Pilot License Verification	Description	D 7. Ret. Code	2 Years	Months	Days	AC Definition AC=Termination of Employment	10. Archival	Remarks	Legal Citations
05.607.10	5.6.009	Parking Permits or Assignments		US							
05.700.10		Accident Reports File	Records relating to traffic accidents, including accident reports, supplemental accident reports, photographs, correspondence and related documentation.	AC	2			AC=Settled.		If as a result of an accident, a person is arrested for a Class B misdemeanor offense or above, retain in accordance with Agency Item # 05.701.10. For a Class C misdemeanor offense arrest or citation, retain in accordance with Agency Item # 05.704.10.	
05.701.10		Arrest File (Class B Misdemeanor Offenses and above)		AC	10			AC=Cleared by conviction, acquittal or dismissal. University police departments may retain longer as required by internal department policies/procedures.		For Class C citations and arrests, see Agency Item # 05.704.10.	
05.702.10		Building Security Reports/File			2						
05.703.10		Campus Security Reports			2					Not including Clery reports. See Agency Item # 05.706.10.	

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	Record Series Item No.		Description	7. Ret. Code	Years	Months	Days	AC Definition	10. Archival	Remarks	Legal Citations
05.704.10		Class C Misdemeanor Offense Arrests and Citations		AC	6			AC=Cleared by conviction, acquittal or dismissal.		If a higher charge is also applied to incident, retain in accordance with Agency Item # 05.701.10.	
05.706.10		Clery Annual Security Reports		CE	3				0		20 U.S.C. § 1092(f); 34 C.F.R. § 668.24, 668.46.
05.706.20		Clery Crime Statistics Data		CE	6					All supporting records used in compiling each Clery annual security report, including but not limited to, copies of crime reports; the daily crime logs; records for arrests and referrals for disciplinary action; timely warning reports; related correspondence and notices. See also Agency Item # 05.706.10.	20 U.S.C. § 1092(f); 34 C.F.R. § 668.24, 668.46.
05.707.10		Parking Violation Reports			5						
05.708.10		Police Call Sheets			2						
05.709.10		Police Dispatcher Logs			2						
05.710.10		Police Incident Reports		CE	3						

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3.	4.	5.	6.		8. Retent	ion Pe	riod	9.		11.	12.			
<b>U U</b>	Record Series Item No.	Record Series Title	Description	7. Ret. Code	Years	Months	Days	AC Definition	10. Archival	Remarks	Legal Citations			
05.711.10		Police Offense Reports (Not Cleared)		AC				AC=The greater of CE+7 or the applicable statute of limitations.		For offense reports associated with an arrest, retain in accordance with Agency Item # 05.701.10 (for Class B misdemeanor offenses and above) or # 05.704.10 (Class C misdemeanor offenses).				
05.712.10		Student Safety Records (traffic appeals, etc.)		AC	5			AC=Settled						
05.713.10		Temporary Vehicle Registration			1									
05.714.10		Tow Records			3									
05.715.10		Vehicle Registration Files			2									
			For Lost and Stolen Property Report, see 5.2.017 For Parking Permits or Assignments, see 5.6.009 For Schedules (Duty Rosters), see 3.3.020 For Security Access Records, see 5.4.012											



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3. Agency	4. Record Series	5.	6.	'. Ret. Code	8. Retent	ion Per Months	Days Da	9.	Archival	11.	12.	
Item No.	Item No.	Record Series Title	Description	7. R		2		AC Definition	10.	Remarks	Legal Citations	
05.800.10		Real Estate, Owned	Purchase contracts, gift agreements, deeds, wills, codicils, estate inventories, probate records, minute orders (authorizing purchase, gift or sale of a portion of the asset), restrictions, judgments, closing documents, surveys, maps, plats, property descriptions, appraisals, broker's opinions of value, property condition reports, inspection reports, geotechnical studies, archeological studies, hydrology studies, ADA compliance reports, habitat and endangered species studies, and related documents and correspondence.	AC	5			AC=For so long as the real estate asset is owned.	0			
05.801.10		Land Management	Commercial and agricultural leases, easements, permits, licenses, minute orders for leases and easements, lease assignments, accounting records, tax assessment/statement/payment/ exemption records, and related documents and correspondence.	AC	5			AC=Expiration or Termination of the Instrument according to its terms.				



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3.	4.	5.	6.		8. Retent	ion Per	iod	9.		11.	12.		
Agency Item No.	Record Series Item No.	Record Series Title	Description	7. Ret. Code	Years	Months	Days	AC Definition	10. Archival	Remarks	Legal Citations		
05.802.20		Mineral Management Records	Mineral deeds, oil and gas leases, proposed drilling programs, general land office statements, production statements, royalty payment records, pooling agreements, mineral lease assignments, division orders, minute orders, seismic permit records, well logs, notices of auction, bid forms, and related mineral documents and correspondence.	AC	5			AC=For so long as the mineral asset is owned.					
05.803.10		Environmental Assessments, Title Policies, and Opinions of Title.		PM									
06.100.10		Applicants Who Do Not Enter		AC	1			AC=Application term		Includes transcripts, acceptance letters, advanced placement records, applications for admission, correspondence, entrance examination reports, letters of recommendation, medical records, placement scores, readmission forms, test scores.			