



STATE OF TEXAS
Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code	734	3. Agency Name					Lamar University				
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	TSLAC ONLY Amend. No.		
			Agency	Storage	Total	9. Remarks					

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AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	O – Review by University Archivist	



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			Agency	Storage	Total	9. Remarks					

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1.1.002	ADM110	Audits Audits and reviews performed by or on behalf of an agency, including the working papers that support the audit. Also includes audits performed on the agency.	AC + 7		AC + 7		AC = Publication or release of final audit findings. The State Auditor's Office retains any copies of its audits performed on Texas state agencies.		
	ADM120	Notary Public Records Records documenting notary transactions completed by a notary public employed by the university. The university may retain log books by agreement with the notary public in the event they separate from the university.	10		10		TSLAC (Texas State Library and Archives Commission) Local Schedule DC 2275-01		
1.1.056	ADM210	ADA (Americans with Disabilities Act) Requests for employees and students participating in the Service to Students with Disabilities (SSD) or similar programs and anyone visiting university facilities includes supporting documentation.	3		3	I	AC= Date of last contact. CAUTION: Refer to SSV100 for counseling records.		

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2. Agency Code 734		3. Agency Name Lamar University							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.
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1.1.021	ADM220	Public Information Requests Exempted Includes all correspondence and documentation relating to requests for records that are exempt under the Public Information Act (Chapter 552, Government Code).	AC + 2		AC + 2		AC=Date of notification that records are exempt.		
1.1.020	ADM230	Public Information Records Request-Not Exempted Includes all correspondence and documentation relating to requests for records that are furnished to the public under Public Information Act (Chapter 552, Government code).	AC +1		AC +1		AC=Date request fulfilled.		
1.1.072	ADM240	Public Information Reports Reports made to the Office of the Attorney General on an agency's Public Information Act activities	2		2				

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			Agency	Storage	Total	9. Remarks				

1.1.057	ADM310	Correspondence-Ephemeral	AC		AC	AC=After purpose of record has been fulfilled. <i>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.</i>		
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Retention Codes (Field 7)				Archival Codes (Field 8)			
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			Agency	Storage	Total	9. Remarks			

1.1.007	ADM315	<p>Correspondence—Administrative Incoming/outgoing and internal correspondence pertaining to the formulation, planning, implementation, interpretation, modification, or redefinition of the programs, services, or projects of an agency and the administrative regulations, policies, and procedures that govern them. Administrative correspondence decides and creates. Offices such as directors, deans, and assistant vice presidents may create administrative correspondence.</p>	4		4	O	<p>ARCHIVES NOTE: Only the administrative correspondence of executive staff, board or commission members, division directors and program heads require archival review.</p> <p>CAUTION: This record series and item number for administrative correspondence (1.1.007) 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 UAD 120 (1.1.004); A letter concerning an audit for that prescribed by ADM110 (1.1.002), etc. SEE ALSO item number ADM415 (1.1.011).</p>		
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Retention Codes (Field 7)				Archival Codes (Field 8)	
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1.1.008	ADM320	Correspondence—General Non-administrative incoming/outgoing and internal correspondence, in any media, pertaining to or arising from the routine operations of the policies, programs, services, or projects of an agency.	2	2		SEE comments to item number 1.1.007. SEE ALSO item number 1.1.010.		
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1.1.007	ADM340	Correspondence—Executive, president, provost	AC+ 4		AC+4	O	<p>ARCHIVES NOTE: Only the administrative correspondence of executive staff, board or commission members, division directors, and program heads, require archival review. Contact the State Archives when these records have met their retention periods.</p> <p>CAUTION: This records series and item number for general correspondence (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 (1.1.004); a letter concerning an audit for that prescribed by ADM110 (1.1.002), etc. SEE ALSO item number ADM 415 (1.1.011).</p> <p>AC=End of term in office</p>		
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			Agency	Storage	Total	9. Remarks			

1.1.006	ADM405	Complaint Records Complaints received by an agency from the public concerning the agency and records pertaining to the resolution of the complaint.	AC + 2		AC + 2	AC = Final disposition of the complaint. CAUTION: If a complaint becomes the subject of litigation, it must be included in and is subject to the minimum retention period of item number 1.1.048.		
1.1.013	ADM410	Calendars, Appointment and Itinerary Records Calendars, appointment books or programs and scheduling, or itinerary records, purchased with state funds or maintained by staff during business hours that document appointments, itineraries, and other activities of agency officials or employees.	CE + 1		CE + 1 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 this retention period. See Open Records Decision 635 issued in December 1995 by the Attorney General.		

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1.1.011	ADM415	Executive Orders Any document that initiates, rescinds, or amends a regulation, policy, or procedure that governs the programs, services, or projects of an agency.	US + 3	US + 3	I			
1.1.010	ADM417	Directives, General Any document that officially initiates, rescinds, or amends general office procedures.	US + 1	US + 1				
5.1.004	ADM420	Directory Information —Phone, Address, email Listings	US	US				
1.1	ADM425	Event Planning Records—Routine This series documents the efforts of a department or division to provide informative sessions, short courses, excursions, and celebratory events for students, faculty and or staff. Examples of routine events: departmental celebrations, retirement celebrations, etc.	AC + 1	AC + 1		AC = Completion of the event.		
1.2.003	ADM430	Forms History File Print masters of original version and all subsequent revisions to an agency form, including any associated design or design modification requests.	AC + 1	AC + 1		AC = Discontinuance of use of form.		

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1.2.004	ADM432	Forms Inventory Any periodic listing of all forms used internally or externally by an agency.	US		US				
1.1.069	ADM435	Reports - Activity Reports compiled by agency personnel on a daily or other periodic basis pertaining to workload monitoring, task completion times, number of public contacts, and similar activities.	1		1		CAUTION: SEE item number 1.1.064.		
5.2.025	ADM437	Equipment Descriptions and Specifications	AC + 2		AC + 2		AC = Equipment is no longer in the agency.		
1.1.023	ADM440	Organizational Charts Records showing internal organizational structure, usually indicating management/supervisory hierarchy. These records should include a footer with the effective date of the organizational structure and the creation date of the document period.	US		US	I	Records are archival and require preservation; send one copy to University Archives when superseded.		

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1.1.008	ADM445	Routine Requests: Information or Services Routine requests for a departmental service, for information, or for publications. Also includes routine requests about the university, such as requests for academic statistics. NOTE: This series covers many instances of routine requests and all examples are not listed.	2	2	2	2	2	2	
5.2.018	ADM455	Quality Control Reports	2		2				
5.4.011	ADM450	Visitor Control Registers Logs, registers, or similar records documenting visitors to limited access or restricted areas of agency facilities.	3		3				
1.1.024	ADM457	Plans and Planning Records Plans and records relating to the process of planning new or redefined programs, services, or projects of an agency that are not included in or directly related to other records series in this schedule.	AC+3		AC+3				AC=Decision made to implement or not to implement result of planning process. ARCHIVES NOTE: Data processing planning records are not archival.

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			Agency	Storage	Total				

1.1.040	ADM460	Speeches, Papers and Presentations Notes or text of speeches, papers, presentations, or reports delivered in conjunction with agency work.	AC		AC	O	AC = End of term in office or termination of service in a state position.		
1.1.041	ADM465	Suggestion System Records Suggestions submitted by agency personnel and responses.	1		1				
1.1.038	ADM470	Customer Surveys Surveys returned by the customers or clients of an agency, and the statistical data maintained rating an agency's performance.	AC		AC		AC = Final disposition of summary report. SEE item number 1.1.067 for summary reports compiled from customer surveys.		
1.1.043	ADM480	Training Materials Instructional materials developed by an agency for training entities or individuals it regulates or serves.	FE+3		FE+3				
1.1.055	ADM500	Strategic Plans Information resources and operational strategic plans prepared in accordance with 2054.095 and 2056.002, Government Code.	AC+6		AC+6	I	AC= September 1 of odd-numbered calendar years. ARCHIVES NOTE: The archival requirement is met by sending the required copies of the plans to the Texas State Publications Depository Program, Texas State Library and Archives Commission.		

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1.1.058	ADM510	Meeting Agenda and Minutes Official agenda and minutes of state boards, committees, commissions, and councils that conduct open meetings as required by Government Code, Chapter 551.	PM		PM	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.		
1.1.063	ADM520	Meeting Minutes, Notes & Agendas-University Leadership	AC+5		AC+5	O	AC=End of semester.		
1.1.063	ADM530	Meeting Minutes, Notes & Agendas-Academic Leadership	AC+5		AC+5		AC=End of semester.		
1.1.063	ADM540	Meeting Minutes, Notes & Agendas-Faculty Senate	AC+5		AC+5	I	AC=End of semester.		

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1.1.063	ADM550	Meeting Minutes, Notes & Agendas--Staff	1		1				
1.1.063	ADM560	Meeting Minutes, Notes & Agendas—Construction Projects	1		1		O		
1.1.063	ADM570	Meeting Minutes, Notes & Agendas, Committees, Councils, Task Forces	2		2		O		
1.1.059	ADM571	Meetings, Certified Agendas or Tape Recordings of Closed Certified agendas or tape recordings of closed meetings of state boards, commissions, committees, and councils.	AC + 2		AC + 2			AC = The date of the meeting or completion of pending action involving the meeting, whichever is later.	
1.1.060	ADM572	Meetings, Audio or Videotapes of Open Audio or videotapes of open meetings of state boards, commissions, committees, and councils.	AC + 90 days		AC + 90 days			AC = Official approval of written minutes of the meeting by the governing body of an agency. CAUTION: Minutes of state agencies are permanent records. Audio and videotapes are not permanent media. State agencies may not retain audio or videotapes of the meetings of governing bodies in lieu of written minutes. The proceedings of all meetings of state boards, committees, commissions, and councils must be reduced to writing. SEE caution comment at item number 1.1.058.	

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1.1.061	ADM573	Meeting - Notes Notes taken during open meetings of state boards, commissions, committees, and councils from which written minutes are prepared.	AC + 90 days	AC + 90 days		AC = Approval of the formal minutes by the governing body. SEE caution comment at item number 1.1.058.		
1.1.062	ADM574	Meetings - Supporting Documentation Documents submitted at meetings of state boards, commissions, committees, and councils including exhibit items, documentation for agenda items, etc. Includes documents sent in advance of meetings for briefing purposes, some of which may not be submitted at an actual meeting.	2	2	I	SEE caution comment at item number 1.1.058.		
1.1.064	ADM610	Agency Performance Measures Documentation Any records of an agency needed for the documentation of output, outcome, efficiency, and explanatory measures in an agency's appropriations request or strategic plan, and for performance measures used to manage the agency.	FE + 3	FE + 3		CAUTION: The FE + 3 retention period overrides any shorter retention period for a records series in this schedule if the records series is needed for documentation of agency performance measures.		

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1.1.024	ADM630	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. Typical records include mission statements, vision statements, master plans, long-range and short-range plans.	AC+3		AC+3	O	Some records have historical value and require preservation, contact the University Archives after the retention period has expired.		
1.1.065	ADM650	Reports and Studies (Non-Fiscal) Raw Data Information or data collected and compiled for the purpose of producing non-fiscal reports.	AV		AV		CAUTION: Documentation used for information or data included or directly related to another records series in this schedule. SEE especially item number 1.1.064		
1.1.067	ADM660	Reports and Studies (Non-Fiscal) Annual, sub-annual, or special reports or studies on non-fiscal aspects of an agency's programs, services, or projects compiled by agency personnel, by advisory committees, or by consultants under contract with an agency that are not noted elsewhere in this schedule. Includes reports distributed either internally or to other entities.	3		3	O			

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1.2.014	ADM710	Records Management Plans Records management plans and similar records that establish the policies and procedures under which records and information are managed in an agency.	US + 1		US + 1				
1.2.005	ADM720	Records Retention Schedule (SLR 105) Agency copy. Formerly RMD 105. Includes documentation of certification and approval - forms SLR 105C (formerly RMD 105C), and/or other forms designated by the State Records Administrator.	US		US		Original is retained by the State and Local Records Management Division, Texas State Library and Archives Commission.		
1.2.001	ADM730	Destruction Authorizations Agency level documents authorizing final disposition of records under a certified records retention schedule.	FE + 3		FE + 3				
1.2.010	ADM740	Records Disposition Logs Logs or similar records listing records destroyed or transferred to the Archives and Information Services Division, Texas State Library and Archives Commission, showing records series title, dates of records, and date destroyed or transferred.	10		10				

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			Agency	Storage	Total	9. Remarks				

1.2.008	ADM750	Request for Authority to Dispose of State Records (RMD 102) Agency copy.	FE + 3		FE + 3	Original is retained by the State and Local Records Management Division, Texas State Library and Archives Commission.		
1.2.011	ADM755	Record Center Storage Approval Forms (RMD 106) Agency copy.	US		US			
1.2.006	ADM760	Records Transmittal Forms Agency copy (includes RMD 101, Tx-R-5, 306-58-1, and Agency Storage Forms). Forms indicate records transferred to storage or a transfer of legal custody.	AC + 2		AC + 2	AC = Date of authorization for destruction, permanent transfer from storage, or transfer to the Archives and Information Services Division, Texas State Library and Archives Commission, by the agency records management officer.		
1.2.012	ADM770	Records Inventory Worksheets	US		US			
1.2.015	ADM780	Disaster Recovery Service Transmittals (RMD 109) Also includes documentation for disaster recovery services provided by other entities.	FE + 1		FE + 1			
1.2.016	ADM785	Disaster Recovery Service Approval Form (RMD 113) Agency copy of form.	AC		AC	AC = Until superseded or termination of service.		

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



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			Agency	Storage	Total	9. Remarks				

1.1.068	ADM840	Reports on Performance Measures Quarterly and annual reports on agency performance measures submitted to executive and legislative offices.	AC+6		AC+6		AC=September 1 of odd-numbered calendar years.		
1.1.073	ADM 850	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 meetings notices, proofs of publication, and meeting minutes.	AC+3		AC+3	O	AC=Last action.		
1.1.074	ADM860	Sunset Review and Documentation	AC+3		AC+3	O	AC=After the subsequent Sunset Review.		
1.1.075	ADM900	Alternative Dispute Resolutions—Final Agreement	AC+4		AC+4		AC=Date of final agreement. Texas Civil Practice and Remedies Code, Chapter 154.071.		

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

1.1	ADV110	Annual Fund Drive Records	10		10				
1.1	ADV120	Friends Records	FE+5		FE+5	O			
1.1	ADV130	Gifts, Records-Deferred Gifts/Donor Files	PM		PM	O			
1.1	ADV140	Gifts, Records-Deferred Gifts, Realized (Legal Papers)	AC+3		AC+3	I	AC=Date gift realized.		
1.1	ADV150	Class Gift Records	5		5	I			
1.1	ADV200	Alumni Records This series documents the activities of an institution or department's alumni and may also provide alumni offices with information on alumni. Records may be used to create a network of support from alumni, primarily through organized alumni groups; to track alumni; to monitor their achievements, activities and recognitions; to create statistics; to reply to information requests; to provide information on the accomplishments of former students.	PM		PM	I			
1.1	ADV230	Alumni Association Services, Program Records	5		5	O			

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1.1	ADV240	Alumni Association Records This series documents the activities of the alumni association board of directors. The board is responsible for promoting the interests and ideals of the institution; stimulating and encouraging school pride in students, graduates, and former students; and developing a sense of responsibility for continued progress in educational programs for the institution.	5		5	I			
1.1.019	ADV310	News/Press Releases-University	2		2	I			
1.1	ADV360	Topical Reference-Subject(Regular "Morgue" Files)	AV		AV	I			
1.1	ADV370	Topical Reference-Biography (People "Morgue" Files)	AV		AV	I			

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			Agency	Storage	Total	9. Remarks				

1.3.001	MAR335	<p>State Publications One copy of each state publication as defined on page xi of the Texas State Records Retention Schedule (4th Edition), Texas State Library, except a publication that is subject to a different retention period in this schedule. For example, a meeting agenda (see item number 1.1.058) also meets the definition, but it must be retained permanently; item numbers 1.1.004, 1.1.055, 1.1.066, 1.1.068, and 4.5.003, which also meet the definition, are closely associated with the appropriations process and must be retained AC + 6.</p>	AC + 2	AC + 2	I	<p>AC = Until superseded or obsolete.</p> <p>CAUTION: Many state publications must be submitted to the Texas State Publications Depository Program, Texas State Library and Archives Commission, by law (Government Code 441.101-441.106). The Texas State Library and Archives Commission will retain a copy of all state publications submitted to it on a continuing basis, subject to periodic evaluation to determine if the publication merits further retention.</p> <p>For additional information and requirements concerning state publications made available to the public through the Internet, consult the administrative rules of the Texas State Publications Depository Program of the Texas State Library and Archives Commission (13 TAC §§3.1-3.16).</p>		
1.3.001	MAR 340	Publications-Brochures	AC+2	AC+2	I			

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1.3.002	MAR 350	Publications-Development Files Background material copy (drafts), original art work, photo negative prints, flats, etc. This includes all work performed both inside and outside the agency.	FE+3		FE+3	O		
1.1	MAR380	Photographs, Audiovisual Recordings, and other Nontextual Media This series provides photographic and/or audiovisual documentation of institution activities, events, students, faculty, and staff. It may be used for student recruitment or orientation, fund-raising, publicity, publications, research, or teaching. This series includes photographs, digital images, photographic scrapbooks, negatives, slide formats, sound recordings, video tapes, posters, and other non-textual media that document institutional history and activities, *except*such records noted elsewhere in the schedule.	AV		AV	I	ARCHIVES NOTE: Archivists should apply archival selection criteria in the appraisal of these items. Selection criteria may include level of identification. Archivists may arrange with digital asset managers or similar personnel to identify historical photographs prior to transfer to the archives. Refer also to 1.1.057 for classification of those images that are weeded out (as unusable, almost-duplicates, etc.)	
1.1	MAR390	Films, Video Tapes, and Sound Recordings	AC		AC	O	AC= After completion of the event, until superseded, or until obsolete.	

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			Agency	Storage	Total					

1.1	CUR 210	Academic Degree & Course Proposals	AC+10		AC+10	I	AC=Until the degree or course proposal is ceased or superseded.		
	CUR220	Curriculum Development Files (Course and Programs)	AC+10		AC+10	I	AC=When the course, program, or certificate is ceased. TSLAC Local Schedule JC3900-01.		
1.1	CUR230	Course Records	AC+2		AC+2	O	AC=End of semester. Provost Office recommends two year retention for academic departments.		
1.1	CUR240	Course Records-Faculty Workload Reports	AC+2		AC+2	I	AC=End of semester.		
1.1	CUR250	Course and Lab Fee Forms	AC+10		AC+10		AC=When the course is ceased. Texas Education Code, Title 3, 54.504		
1.1	CUR310	Non-University Student Program Administration Records	10		10	O			
1.1.064	CUR400	Academic Program Reviews (APR)	US		US	I	US=Until superseded. NOTE: Coordinating Board changed review period to every 7 years (starting in 2012). When a new APR is received for a program, send the previous APR to the University Archives.		

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2.2.010	EDP110	Data Processing Policies and Procedures Manuals, guidelines, or similar documents establishing data processing policies and procedures in an agency in such areas as access and security, systems development, data retention and disposition, data ownership, production control, system back-up, etc.	US + 3		US + 3		CAUTION: Does not include technical documentation of procedures necessary for reading or processing of electronic records. SEE Item 2.1.009		
2.2.002	EDP130	Chargeback Records to Data Processing Services Users Records used to document, calculate costs, and bill program units for computer usage and data processing services. These records are also used for cost recovery, budgeting, or administrative purposes.	FE + 3		FE + 3				
2.2.016	EDP150	Software Registrations, Warranties and License Agreements	LA + 3		LA + 3				

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2.1.010	EDP210	Audit Trail Records Files needed for electronic data audits such as files or reports showing transactions accepted, rejected, suspended, and/or processed; history files/tapes; records of on-line updates to application files or security logs.	AC		AC		AC = All audit requirements have been met.	
2.1.002	EDP220	Master Files Relatively long-lived computer files containing organized and consistent sets of complete and accurate electronic records. Examples include, but are not limited to, data tables of relational databases used by applications or computer programs.	AC		AC		AC = Completion of 3rd verification cycle, or audit completion confirming successful transaction updates, or required audit trail maintenance, or the ability to restore or migrate when errors are detected or when hardware or software changes occur. CAUTION: Records management officers must be certain before assigning the retention period of AC to agency automated processing files that the files do not fall under records series listed elsewhere.	

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2.1.011	EDP230	Finding Aids, Indexes, and Tracking Systems Automated indexes, lists, registers, and other finding aids used to provide access to records.	AC	AC	AC	AC = The related records have been destroyed. CAUTION: These records must carry the same retention period and archival code of the records they support.		
2.1.008	EDP240	Hardware Management and Documentation Records documenting operational and maintenance requirements of computer hardware such as operating manuals, hardware/operating system requirements, hardware configurations, and equipment control systems.	AC	AC	AC	AC = Until electronic records are transferred to and made usable in a new hardware environment or there are no electronic records being retained to meet an approved retention period that require the hardware to be retrieved and read. CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records. 13 TAC 6.94.		

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2.1.001	EDP250	<p>Processing Files Machine-readable files used in the creation, utilization, and updating of master files.</p>	AC		AC	<p>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.</p> <p>CAUTION: Records management officers must be certain before assigning the retention period of AC to agency automated processing files that the files do not fall under records series listed elsewhere.</p>		
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Retention Codes (Field 7)				Archival Codes (Field 8)	
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2.1.007	EDP260	<p>Software Programs Automated software applications and operating system files including job control language, program listing/source code, etc.</p>	AC		AC	<p>AC = Until electronic records are transferred to and made usable in a new software environment or there are no electronic records being retained to meet an approved retention period that require the software to be retrieved and read.</p> <p>CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records. 13 TAC 6.94.</p>		
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Retention Codes (Field 7)				Archival Codes (Field 8)			
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2.1.009	EDP270	<p>Technical Documentation Records adequate to specify all technical characteristics necessary for reading or processing of electronic records and their timely, authorized disposition including documentation describing how a system operates and necessary for using the system such as user guides, system or sub-system definitions, system specifications, input and output specifications, and system flow charts; program descriptions and documentation such as program flowcharts, program maintenance logs, change notices, and other records that document modifications to computer programs; and data documentation necessary to access, retrieve, manipulate, and interpret data in an automated system such as a data element dictionary, file layout, code book or table, and other records that explain the meaning, purpose, structure, logical relationships, and origin of the data elements.</p>	AC		AC		<p>AC = Until electronic records are transferred to and made usable in a new hardware or software environment with new documentation or there are no electronic records being retained to meet an approved retention period that require the documentation to be retrieved and read.</p> <p>CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records. 13 TAC 6.94.</p>	
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Retention Codes (Field 7)				Archival Codes (Field 8)	
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2.2.011	EDP310	Batch Data Entry Control Records Forms and logs used to reconcile batches submitted for processing against batches received and processed.	AC		AC		AC = When reconciliation confirmed.		
2.2.015	EDP330	Internet Browser History/Web Sites Visited	AV		AV		The disposal of history files need not be documented through destruction authorizations (1.2.001) or in records disposition logs (1.2.010), but agencies should establish procedures governing disposal of these records as part of its records management plan (1.2.014).		
2.2.014	EDP335	Internet Cookies Data resident on hard drives that make use of user-specific information transmitted by the Web server onto the user's computer so that the information might be available for later access by itself or other servers.	AV		AV		The disposal of Internet cookies need not be documented through destruction authorizations (1.2.001) or in records disposition logs (1.2.010), but agencies should establish procedures governing disposal of these records as part of its records management plan (1.2.014).		
2.2.012	EDP340	Output Records for Computer Production Reports showing transactions that were accepted, rejected, suspended, and/or processed.	AV		AV				

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2.2.013	EDP350	Quality Assurance Records Information verifying the quality of system, hardware, or software operations including records of errors or failures and the loss of data resulting from such failures, documentation of abnormal termination and of error free processing, checks of changes put into production, transaction histories, and other records needed as an audit trail to evaluate data accuracy.	AC		AC		AC = No longer needed as an audit trail for any records modified.		
2.2.001	EDP360	System Monitoring Records Electronic files or automated logs created to monitor computer systems such as print spool logs, console logs, tape activity logs, etc.	AV		AV				
2.2.015	EDP370	History Files - Web Sites A record of the documents visited during an Internet session that allows users to access previously visited pages more quickly or to generate a record of usage of a state-owned computer.	AV		AV		The disposal of history files need not be documented through destruction authorizations (1.2.001) or in records disposition logs (1.2.010), but agencies should establish procedures governing disposal of these records as part of its records management plan (1.2.014).		

Retention Codes (Field 7)				Archival Codes (Field 8)	
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3.1.012	PER110	Employment Opportunity Announcements Internal or external announcements or advertisements of job openings, promotions, training programs, or opportunities for overtime.	2	2	2	29 CFR 1602.31 [State Agencies]. 29 CFR 1602.49(a) [State Universities].		
3.1.001	PER130	Applications for Employment - Not Hired Applications, resumes, transcripts, letters of reference, and similar documents whose submission by candidates for vacant positions is required on the application form, by application procedures, or in the employment advertisement.	2	2	2	29 CFR 1602.31 [State Agencies]. 29 CFR 1602.49(a) [State Universities].		
3.1.014	PER150	Employment Selection Records Includes notes of interviews with candidates, questions asked of applicants, audio and videotapes of job interviews, driving record and previous injury checks, pre-employment physical examinations, pre-employment drug screening test results, polygraph examination results; and all other records that document the selection process.	2	2	2	29 CFR 1602.31 [State Agencies]. 29 CFR 1602.49(a) [State Universities]. CAUTION: Does not include criminal history checks. SEE item number 3.1.026.		

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3.1.002	PER160	Applications for Employment - Hired Applications, resumes, transcripts, letters of reference, and similar documents whose submission by candidates for vacant positions is required on the application form, by application procedures, or in the employment advertisement.	AC + 5		AC + 5		AC = Termination of employment.		
3.1.023	PER200	Position/Job Descriptions Job descriptions, including all associated task or skill statements, for positions in an agency.	AC + 4		AC + 4		AC = Until superseded or job eliminated. 40 TAC 815.106(i).		
3.1.026	PER205	Criminal History Checks Criminal history record information on job applicants or agency employees obtained from the Department of Public Safety (DPS).	AC		AC		AC=The criminal history record has served the immediate purpose for which it was obtained. CAUTION: An agency that is authorized to obtain a criminal history record information from DPS must refer to its agency's legislation or see Subchapter F, Chapter 411, Government Code for appropriate retention and use of this information.		

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			Agency	Storage	Total	9. Remarks			

3.1.029	PER210	Employment Eligibility, Documentation or Verification Of Federal reporting form (INS I-9).	AC+1		AC+1	AC=Termination of employment. 8 CFR 0274a.2(b) (2)(i) (A) and (c) (2). 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 INS I-9 forms for employees who terminate from an agency less than 3 years from day of hire are kept for the 3 year retention period.		
3.1.038	PER220	Public Access Option Form Form completed and signed by employee or official, or former employee or official, electing to keep home address, home telephone number, social security number, and family information open or confidential under the Public Information Act, Government Code §552.024.	US		US	SEE item number 3.3.011.		
3.1.013	PER230	Employment Contracts	AC + 7		AC +7	AC = Expiration or termination of the contract according to its terms.		

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



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2. Agency Code	734	3. Agency Name							Lamar University	
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total	9. Remarks				

3.1.034	PER232	Resumes - Unsolicited Retention period applies if an agency replies to the sender of a resume that it will be kept on file should future job openings occur.	AV	AV	SEE item number 3.1.014 for resumes, whether solicited or unsolicited, that are used in any way in the employment selection process.		
3.1.035	PER235	Performance Bonds Bonds posted by employees and individuals or entities under contract with an agency for the performance of the duties of a position or the terms of a contract with the agency.	AC + 4	AC + 4	AC = Expiration or termination of the bond according to its terms. CAUTION: Does not include construction or architectural surety bonds. SEE item number 5.2.028.		
3.1.036	PER240	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.	AC+ 5	AC+5	29 CFR 30.8(e).		

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

3.1.020	PER270	<p>Personnel Corrective Action Documentation</p> <p>Corrective actions are those actions which do not affect pay, status, or tenure and are imposed to correct or improve an employee's job performance.</p>	AC + 5		AC + 5	<p>AC = Termination of corrective action.</p> <p>CAUTION: If, during the retention period of this records series, any part of this series is used to document and support personnel disciplinary action under item number 3.1.021, all documentation from this series used to support disciplinary action must be retained for the the minimum retention period described by item number 3.1.021.</p>		
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Retention Codes (Field 7)				Archival Codes (Field 8)	
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	I – Transfer to University Archives	
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			Agency	Storage	Total	9. Remarks			

3.1.021	PER285	Personnel Disciplinary Action Documentation Disciplinary actions are those actions which may affect pay, status, or tenure. They are imposed to discipline an employee whose conduct is harmful to the best interests of the state, the agency, or the employee work force; and for failure to improve performance or conduct following imposition of corrective action. May include cause for demotion, suspension, or dismissal, and the reasons for failure to give written notice of resignation. May also be used to document evidence of employee self-improvement efforts, as well as favorable and unfavorable communication.	AC + 5		AC + 5		AC = Termination of employment.		
3.1.011	PER310	Employee Retirement Selection-Optional Retirement Program/ Teachers Retirement System/ Texas Employee Retirement System	AC+75		AC+75		AC=Termination of employment.		

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			Agency	Storage	Total	9. Remarks			

3.1.011	PER320	Employee Insurance Records Agency copies of information relating to the selection by employees of life, disability, health, and other types of insurance offered by the State of Texas to its employees.	AC		AC	AC = Until superseded or termination of employment. CAUTION: Documents that serve as payroll deduction authorizations must be maintained for the retention period prescribed for item number 3.2.001.		
3.1.019	PER410	Performance Appraisals	2		2	29 CFR 1620.32(c).		
3.1.019	PER420	Performance Appraisals-Tenure or Promotion Track Employees	AC+ 2		AC+ 2	AC=The end of the tenure or career ladder review period. 29 CFR 1620.3(c)		
3.1	PER440	Faculty Tenure and Promotion Records	AC+5		AC+5	AC=Completion of the annual tenure review process.		
3.1.037	PER450	Employee Recognition Records Awards, incentives, tenure, etc.	AC + 5		AC + 5	AC = Termination of employment.		
3.1.022	PER460	Personnel Information or Action Forms 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.	2		2	29 CFR 1602.31 [State Agencies]. 29 CFR 1602.49(a) [State Universities].		

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

3.1.024	PER470	Physical Examinations/Medical Reports Medical or physical examination reports or certificates of employees for whom periodic monitoring of health or fitness is required.	AC + 2		AC + 2		AC = Until superseded or termination of employment. CAUTION: Does not include pre-employment physical examinations. SEE item number 3.1.014.		
3.1.002	PER510	Personnel Files (Human Resources)	AC+5		AC+5		AC=Termination of employment		
3.1.002	PER520	Personnel Files-Faculty, Tenured and Tenure Track (Faculty Records)	AC+10		AC+10	I	AC=Termination of employment. 29CFR 1602.49; required for SACS Review.		
3.1.002	PER530	Personnel Files-Faculty, Adjunct (Faculty Records)	AC+10		AC+10		AC=Termination of employment. Required for SACS Review.		
3.1.002	PER550	Personnel Files-Departmental Copies	AC+5		AC+5	O	AC=Employee separation from department (Transfer or Termination.)		
3.2.002	PER570	Employee Earnings Records	4		4		40 TAC 815.106 (i)		
3.3.011	PER600	Former Employee Verification Records Minimum information needed to verify employment, includes name, social security number, exact dates of employment, last known address and most recent public access option form.	AC + 75		AC + 75		AC = Termination of employment. See item number 3.1.038.		
3.3.015	PER605	Positions/Job Classification Review File Records relating to review and monitoring of job classifications within an agency.	US + 3		US + 3				

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			Agency	Storage	Total	9. Remarks				

3.3.024	PER610	Personnel Policies and Procedures Any internally distributed manuals, guidelines, or similar records that define agency wide policies and procedures concerning the personnel of an agency.	US + 3		US + 3	I			
3.3.025	PER615	Job Procedure Records Any documents detailing the procedural duties and responsibilities of agency positions on a position-by-position basis.	US+3		US+3				
3.3.027	PER620	Aptitude and Skills Tests Aptitude or skills tests required of job applicants or of current personnel to qualify for promotion or transfer.	US + 2		US + 2		29 CFR 1602.31 [State Agencies]. 29 CFR 1602.49 [State Universities]. CAUTION: One copy of each different test (different in terms of either questions or administration procedures) should be retained for the period indicated.		
3.3.028	PER621	Aptitude and Skills Tests (Test Papers) Aptitude and skills test papers of job applicants or of current personnel taking a test to qualify for promotion or transfer.	2		2		29 CFR 1602.31 [State Agencies]. 29 CFR 1602.49 [State Universities].		

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

3.3.029	PER622	Aptitude and Skills Tests (Validation Records) Records of the validation of aptitude and skills tests.	AC + 2		AC + 2	AC = As long as the test is used by an agency. 29 CFR 1602.31 [State Agencies]. 29 CFR 1602.49 [State Universities].		
3.3.030	PER625	Training Administration Records Instructional materials and other records associated with in-house training of agency personnel on personnel policies and procedures and other policies and procedures that govern an agency's programs, services, or projects.	US + 2		US + 2	CAUTION: Does not include hazardous material training records. SEE item number 5.4.007.		
3.3.020	PER630	Work Schedules/Assignments Work, duty, shift, crew, or case schedules, rosters, or assignments.	1		1			
3.3.023	PER640	Reimbursable Activities, Requests and Authorizations to Engage in Requests and authorizations for travel; participation in educational programs, workshops, or college classes; or for other work-related activities for which the expenses of the employees are defrayed or reimbursed.			3			

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

3.3.001	PER660	Affirmative Action Plans Affirmative Action Plans for both regular employees and apprenticeship programs.	5		5		29 CFR 30.8 (e) for apprenticeship plans.		
3.3.026	PER665	Agency Staffing Reports Any documents detailing the procedural duties and responsibilities of agency positions on a position-by-position basis.	US+3		US+3				
3.3.031	PER670	EEO Reports and Supporting Documentation Includes documentation used to complete EEO reports.	3		3		29 CFR 1602.32, 1602.39, 1602.41, 1602.48, and 1602.50.		
3.3.032	PER675	Equal Pay Records Reports, studies, aggregated or summary data, and similar documentation compiled to monitor and demonstrate compliance with the Federal Equal Pay Act.	3		3		29 CFR 1620.32.		

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

3.3.004	PER675	Benefit Plans Employee benefit plans such as pension; life, health, and disability insurance; deferred compensation; etc., including amendments.	US + 1		US + 1	29 CFR 1627.3(b)(2).		
3.2.010	PER680	Human Resources Information System (HRIS) Reports Includes supporting documentation	AC+4		AC+4			
3.3.010	PER685	Labor Statistics Reports Reports providing statistical information on labor force.	3		3			
3.2.008	PER710	Direct Deposit Application/Authorizations	US		US	US=Until superseded or until employment is terminated		
3.2.001	PER720	Employee Deduction Authorizations Documentation used to start, modify, or stop all voluntary or required deductions from payroll, including garnishment or other court-ordered attachments.	AC + 4		AC + 4	AC = After termination of employee or after amendment, expiration, or termination of authorization, whichever sooner.		
3.2.004	PER730	Income Adjustment Authorizations Used to make increases or decreases to employees' gross pay, FICA, retirement, or in the computation of taxes.	2		2	29 CFR 516.6(c).		

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

3.2.009	PER740	State Deferred Compensation Records	AC + 5	AC + 5	AC = All accounts with a vendor or vendors for the individual participant have been closed. For instructions regarding the determination of the closure of accounts and for additional information regarding the retention period see the most current edition of the <i>Benefits Coordinator Reference Manual</i> issued by the Employees Retirement System of Texas.		
3.2.003	PER760	Federal Tax Records Includes 1099, W2, FICA, and other tax records.	AC + 4	AC + 4	AC = Tax due date, date the claim is filed, or date tax is paid whichever is later. 26 CFR 31.6001 - 1(e)(2).		
3.2.005	PER765	W-4 Forms Employer's copy of "Employee's Withholding Exemption Certificate."	AC + 4	AC + 4	AC = Until superseded, obsolete, or upon separation of employee. 26 CFR 31.6001-1 (e)(2).		
3.2.007	PER770	Unemployment Compensation Records	AC + 5	AC + 5			
3.2.006	PER780	Wage Rate Tables	2	2	29 CFR 516.6(a)(2).		

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

3.4.002	PER790	Leave Status Reports Cumulative report is issued each pay cycle and provides employee leave status information for each position.	FE + 3		FE + 3			
3.4.003	PER795	Less Than Full-Time Worked Reports Dates and hours.	4		4		40 TAC 815.106(i).	
3.4.004	PER800	Overtime Authorizations	2		2			
3.4.005	PER805	Overtime Schedules	2		2			
3.4.006	PER810	Time Cards and Time Sheets	4		4		40 TAC 815.106(i).	
3.4.006	PER820	Time Sheets and Attendance Forms— Student Workers Student time sheets and records of hours worked by student workers. This series includes records of time worked by students paid from restricted funds (including Department of Veterans Affairs, G.I. Bill, Department of Education, and other work study funds).	FE+4		FE+3		40 TAC 815.016(i). FAgencies should expect the Employee Work Record to be reviewed from external and internal audits as contracts and grants, student financial aid, or Fair Labor Standards Act (FLSA). For work-study students, federal and state programs require agencies to retain the time record for a minimum of 3 years from the end of the award year.	
3.4.007	PER830	Time Off and/or Sick Leave Requests	FE + 3		FE + 3			

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3.4.001	PER840	Accumulated Leave Adjustment Requests Used to create employee leave balances, to transfer leave balances when an employee transfers positions, to adjust carry-over balances on August 31, to correct errors on leave accumulation, and to close out leave accounts on separated employees.	FE+3	FE+3				
3.4.008	PER850	Sick Leave Pool Documentation Requests submitted, approvals, number of hours transferred in and out, etc.	FE + 3	FE + 3				

Retention Codes (Field 7) AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value CE – Calendar Year End FE – Fiscal Year End LA – Life of Asset MO – Months PM – Permanent US – Until Superseded	Archival Codes (Field 8) I – Transfer to University Archives O – Review by University Archivist
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	FIN100	Ticket Sales Records—Other This series documents the printing, selling, distribution, and accounting of tickets for university-sponsored performing arts and other non-athletic events where tickets are sold for admission. Records may include: ticket stock orders, ticket type reports, ticket purchase manifest forms; box office balance sheets; ticket printing and control records; season ticket sales lists; receipts and orders for mail, phone, and in-person purchase of tickets; ticket sales summary sheets and reports; free ticket sign-up sheets; lists and reports of free tickets distributed to patrons, contributors, and others; deposit receipts; and related documentation and correspondence.	FE+3		FE+3			
4.1.001	FIN110	Accounts Payable Information	FE + 3		FE + 3			
4.1.002	FIN120	Billing Detail	FE + 3		FE + 3		CAUTION: Does not include long distance telephone billing detail. SEE item numbers 5.5.001, 5.5.006, and 5.5.007.	
4.1.002	FIN121	Student Charge Records (4-CA)	10		10			

Retention Codes (Field 7)				Archival Codes (Field 8)			
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4.3	FIN125	General Property Deposits-Refunds, Forfeits, Assignments	FE+3		FE+3			
4.1.003	FIN130	Canceled Checks/Stubs/Warrants/Drafts	FE + 3		FE + 3			
4.1.004	FIN140	Encumbrance Detail	FE + 3		FE + 3			
4.1.005	FIN150	Inventory and Other Cost Files Production, job, labor, quotes, pricing, specifications, etc.	FE + 3		FE + 3			
4.1.006	FIN160	Investment Transaction Files	FE + 3		FE + 3			
4.1.007	FIN170	Transfers or Budget Revisions Transfers or adjustment to budgets.	FE + 3		FE + 3			
4.1.008	FIN180	Electronic Fund Transfers Direct Deposit Registers.	FE + 3		FE + 3			
4.2.001	FIN210	Cash Deposit Vouchers Cash deposit slips.	FE + 3		FE + 3			
4.2.002	FIN220	Cash Receipts Includes receipts for fees (permits, licenses, renewals, etc.).	FE + 3		FE + 3			
4.2.003	FIN230	Daily Cash Receipts Logs	FE + 3		FE + 3			
4.2.004	FIN240	Encumbrance Vouchers Orders, statements, change orders, etc.	FE + 3		FE + 3			
4.2.005	FIN250	Purchase Vouchers Requisitions, orders, receiving reports, invoices, or statements, change orders, best value determinations, etc.	FE + 7		FE + 7			

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4.2.006	FIN260	General Journal Vouchers	FE + 3		FE + 3			
4.2.007	FIN270	Expenditure Vouchers Travel, payroll, etc.	FE + 3		FE + 3			
4.3.001	FIN310	Sales Journals or Registers	FE + 3		FE + 3			
4.3.002	FIN320	Receipts Journals or Registers	FE + 3		FE + 3			
4.3.002	FIN322	Receipts Journals or Register: Gifts in Kind Records	PM		PM			
4.3.003	FIN330	Expenditures Journals or Registers	FE + 3		FE + 3			
4.3.003	FIN331	Expenditures Journals or Registers: Warrant Register/CUFS Monthly Reports(4AC)	FE+10		FE+10			
4.4.001	FIN410	General and Subsidiary Ledgers	FE + 3		FE + 3			
4.4.001	FIN411	CUFS Monthly Reports/General Ledgers (4-AC)	FE+10		FE+10			
4.4.002	FIN420	Accounts Receivable Ledgers	FE + 3		FE + 3			
4.4.003	FIN430	Accounts Payable Ledgers	FE + 3		FE + 3			
4.4.004	FIN440	Employee Savings Bond Ledgers	FE + 3		FE + 3			
4.5.001	FIN510	Worksheets for Preparing Fiscal Reports	FE + 3		FE + 3			
4.5.002	FIN520	Internal Fiscal Management Reports Includes agency monthly budget reports.	FE + 3		FE + 3			

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

4.5.003	FIN530	Annual Financial Reports Required by the General Appropriations Act (100 Day Report).	AC + 6		AC + 6 I	AC = September 1 of odd-numbered calendar years. CAUTION: If an agency does not produce a biennial or annual narrative report as described in item number 1.1.066, then these annual financial reports must be marked with Archival Code I. The archival requirement, when a biennial or annual narrative report is not produced, is met by sending the required copies of the reports to the Texas State Publications Depository Program, Texas State Library and Archives Commission.		
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Retention Codes (Field 7)				Archival Codes (Field 8)	
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	I – Transfer to University Archives	
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	O – Review by University Archivist	



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2. Agency Code	734	3. Agency Name							Lamar University	
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total	9. Remarks				

4.5.003	FIN531	Annual Financial Report-Friends Groups	AC+6		AC+6	O	<p>AC = September 1 of odd-numbered calendar years.</p> <p>CAUTION: If an agency does not produce a biennial or annual narrative report as described in item number 1.1.066, then these annual financial reports must be marked with Archival Code I. The archival requirement, when a biennial or annual narrative report is not produced, is met by sending the required copies of the reports to the Texas State Publications Depository Program, Texas State Library and Archives Commission.</p>		
4.5.005	FIN550	External Fiscal Reports Special purpose - i.e. federal financial reports, salary reports, etc. Includes HUB (Historically Important Businesses) Reports.	FE + 3		FE + 3				
4.5.005	FIN551	Federal Tax Returns	FE+8		FE+8	O	IRS publication 552		
4.5.005	FIN552	Property Tax Exemption Claim Records	FE+8		FE+8	I	IRS publication 552		

Retention Codes (Field 7)						Archival Codes (Field 8)	
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2. Agency Code 734		3. Agency Name Lamar University							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title			7. Retention Period Agency Storage Total		8. Archival 9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.

4.5.006	FIN560	Annual Operating Budgets Required by the General Appropriations Act.	FE + 3		FE + 3	I		
4.5.007	FIN570	USAS Reports – Daily	AC		AC		AC = Receipt and reconciliation of monthly report.	
4.5.008	FIN580	USAS Reports - Monthly	AC		AC		AC = Receipt and reconciliation of annual report.	
4.5.009	FIN590	USAS Reports - Annual	FE + 3		FE + 3			
4.6.001	FIN610	Balancing Records	FE + 3		FE + 3			
4.6.001	FIN611	Balancing Records: Monthly Operating Report (4-AC)	FE+10		FE+10			
4.6.002	FIN620	Reconciliations	FE + 3		FE + 3			
4.6.002	FIN621	Long Term Bond Coupons	25		25			
4.6.002	FIN622	Reconciliations: Bond Coupons Destruction Certificates	25		25			
4.6.003	FIN630	Cash Counts	FE + 3		FE + 3			
4.7.001	FIN630.5	Accounting Policies and Procedures Manual	US + 3		US + 3			
4.7.002	FIN720	Bank Statements	FE + 10		FE + 10			
4.7.003	FIN730	Returned Checks/Warrants/Drafts (Uncollectable)	AC + 3		AC + 3		AC = After deemed uncollectable.	
4.7.004	FIN740	Capital Asset Records	LA +3		LA +3			
4.7.005	FIN750	Claim Files	AC + 3		AC + 3		AC = Resolution of claim.	

Retention Codes (Field 7)				Archival Codes (Field 8)	
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2. Agency Code	734	3. Agency Name							Lamar University	
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total	9. Remarks				

4.7	FIN760	Unclaimed Property Records	10	10		Texas Comptroller of Public Accounts, Holder Information: Reporting Unclaimed Property Retention Note: Unclaimed property includes uncashed checks		
4.7.006	FIN765	Comptroller Statements	FE + 3		FE + 3			
4.7.007	FIN770	Detail Chart of Accounts One for all accounts in use for a fiscal year.	FE + 3		FE + 3			
4.7.008	FIN790	Federal Grant Records	AC + 7		AC + 7	AC = Satisfaction of all Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments (the Common Rule). CAUTION: Retention requirements may vary depending on the specific federal funding agency. Agencies must ensure that records are retained for the appropriate retention period.		
4.7.009	FIN800	Fixed Asset Sequential Number Logs	US + 3		US + 3			
4.7.010	FIN810	Long-Term Liability Records Bonds, etc.	AC + 3		AC + 3	AC = Retirement of debt.		

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

4.7.011	FIN820	Texas Building and Procurement Commission Statements (TBPC) Charge or bill statements received by agencies from the TBPC for services provided.	FE + 3		FE + 3		FE=Fiscal year end.		
4.7.012	FIN830	Signature Authorizations Signature cards or similar records establishing authority of an agency employee to initiate or authorize financial transactions on behalf of an agency.	US + FE + 3		US + FE + 3		US=Until superseded, then fiscal year end + 3 years.		
5.2.001	FIN910	Appraisals - Building or Property	AV		AV	O			
5.1.001	FIN920	Contracts and Leases Contracts, leases, and agreements include general obligation, land lease, utilities, and construction except for buildings. Documents include specifications, affidavits of publication of calls for bids, accepted bids, performance bonds, contracts, purchase orders, inspection reports, and correspondence.	AC + 4		AC + 4		AC = Expiration or termination of the instrument according to its terms. SEE item number 5.2.028 for building construction contracts and item number 5.1.017 for contract logs.		
5.1.010	FIN930	Licenses and Permits for Non-vehicles Does not include licenses and permits issued by an agency as part of its statutory responsibilities.	AC + 2		AC + 2		AC = Expiration date of license or permit.		

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



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2. Agency Code	734	3. Agency Name							Lamar University	
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total	9. Remarks				

5.1.014	SVC110	Office Procedures Any internally distributed manual, guidelines, or similar records that establish standard office procedures for an agency; for example, agency style manuals, telephone protocols, mail room procedures, print shop and photocopy ordering instructions.	US + 1		US + 1				
5.1.011	SVC120	Photocopier and Telefax Usage Logs & Reports	AV		AV				
5.1.007	SVC140	Requisitions for In-Agency or Inter-Agency Copy/Printing Service Includes word processing and data processing.	AV		AV				
5.1.012	SVC150	Charge Schedules/Price Lists Schedules of prices charged by an agency for services to the public or other agencies, including any documentation used to determine the charges.	US + 3		US + 3				
5.1.015	SVC160	Correspondence Tracking Records Any record created by an agency to track any type of incoming and outgoing correspondence or packages by the U.S. Postal Service or by private couriers.	1		1				

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

5.1.003	SVC170	Delivery Reports	2		2				
5.1.004	SVC200	Mail and Telecommunications Listings Any mailing address, telephone or fax number, or e-mail address records maintained by an agency on its employees or on entities or persons it serves.	US		US				
5.2.001	SVC300	Appraisals-Building or Property	AV		AV	O			
5.5.004	SVC310	System Activity Reports Internal listing of all incoming/outgoing agency telephone activity.	AV		AV				
5.5.003	SVC320	Station Activity Reports Internal listing of incoming/outgoing telephone activity to individual telephone stations.	AV		AV				
5.5.002	SVC330	Long Distance Telephone Logs Long distance logs created by agencies for internal documentation purposes. Includes any similar logs created for long distance facsimile or electronic transmissions.	AV		AV				

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



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2. Agency Code 734		3. Agency Name Lamar University						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total			
5.5.001	SVC340	Billing Detail - Telecommunications In addition to summary detail, includes any accompanying detailed listing of long distance calls.	FE + 3		FE + 3			

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2. Agency Code	734	3. Agency Name							Lamar University	
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total	9. Remarks				

5.2.002	FCL100	Building Construction Project Files Planning, design, and construction records; accepted and rejected bids; correspondence; etc.	AC + 10		AC + 10	O	AC = Completion of project. SEE ALSO item numbers 5.2.003 and 5.2.028.		
5.2.028	FCL120	Building Construction Contract and Inspection Records Building construction contracts, surety bonds, and inspection records.	LA + 10		LA + 10	O	SEE ALSO item numbers 5.2.002 and 5.2.003.		
5.2.003	FCL130	Building Plans and Specifications Includes architectural and engineering drawings, profiles, and blueprints.	State owned: LA Leased: AC+2		State owned: LA Leased: AC+2	O (state owned only)	AC: For leased buildings, AC = Termination or cancellation of lease. SEE ALSO item numbers 5.2.002 and 5.2.028. ARCHIVES NOTE: Archival review designation is for state-owned buildings only.		
5.2.024	FCL140	Material Specifications	AC + 2		AC + 2		AC = Material is no longer in the agency.		
5.2.004	FCL210	Building Space Requests	1		1				
5.2.027	FCL220	Space Utilization Reports	AV		AV				

Retention Codes (Field 7)	Archival Codes (Field 8)
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2. Agency Code	734	3. Agency Name							Lamar University	
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total	9. Remarks				

5.2.026	FCL230	Facilities Reservation Logs Reservation logs or similar records relating to the use of agency facilities such as meeting rooms, auditoriums, etc.	2		2				
5.2.007	FCL320	Damage Reports Reports of damage to state property.	FE + 3		FE + 3				
5.2.022	FCL410	Utility Usage Reports	AV		AV				
5.6.007	FCL820	Vehicle Titles & Registrations	LA		LA				
5.6.003	FCL830	Inspection and Repair Maintenance Records-Vehicles	LA+1		LA+1				
5.6.005	FCL840	Vehicle Use Reports Includes mileage, fuel-oil consumption, passengers carried and other related operational information.	FE+3		FE+3				
5.6.004	FCL850	License and Driving Record Checks	AC		AC		AC=Until superseded or until termination of employment.		

Retention Codes (Field 7)	Archival Codes (Field 8)
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2. Agency Code	734	3. Agency Name							Lamar University	
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total	9. Remarks				

5.2.021	EQS120	Surplus Property Sale Reports	FE + 3		FE + 3			
5.2.020	EQS130	Supply Usage Records	FE + 1		FE + 1			
5.2.005	EQS210	Calibration Records(Equipment or Instrument)	10		10			
5.2.008	EQS230	Equipment History File; Equipment Service Agreements Agreements or contracts between the agency and equipment vendor to provide maintenance service for equipment. Includes requests for installation, moves, service, etc.; and service/repair logbooks, etc.	LA + 7		LA + 7			
5.2.009	EQS240	Equipment Inventory Detail Report Forms Updates agency portion of the inventory listing and adds, changes, transfers, or deletes items from inventory.	FE + 3		FE + 3			
5.2.010	EQS250	Equipment Manuals	LA		LA			
5.2.011	EQS260	Equipment Warranties	AC + 1		AC + 1		AC = Expiration of warranty.	
5.2.012	EQS300	Estimate Files (Supply and Repair Cost Estimates)	1		1			
5.2.014	EQS310	Inventory - Annual Physical Property, equipment, supply verification.	FE + 3		FE + 3			

Retention Codes (Field 7)	Archival Codes (Field 8)
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2. Agency Code	734	3. Agency Name							Lamar University	
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total	9. Remarks				

5.2.015	EQS330	Inventory, Notices of Equipment Removed From	FE + 3		FE + 3			
5.2.023	EQS340	Year-to-Date Activity (Inventory Listing) Shows additions, changes, transfers, and deletions of information within the inventory system. Data include agency, division, tag number, batch, document, transaction date, location, item code, description, date, and cost.	FE + 3		FE + 3			
5.2.016	EQS350	Inventory System Update Listings Listing shows all additions, changes, deletions, and transfer times for the monthly processing period.	AC		AC		AC = Transfer of information into annual listing.	
5.2.017	EQS360	Lost & Stolen Property Reports	FE + 3		FE + 3			

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

5.3.009	SVC210	Requests for Information Requests for information preliminary to the procurement of goods or services by direct purchase or bid.	AC+ 7		AC+ 7	AC = Date of direct purchase, issuance of request for bids, or decision not to proceed with the procurement, as applicable.		
5.2.019	SVC215	Service Orders Agency copy of forms completed by mechanical service personnel for installation or repair. Includes billing code, service, labor, parts, and remarks.	1		1			
5.3.007	SVC220	Bid Documentation Includes bid requisition/authorizations, invitations to bid or propose, bid specifications, accepted and rejected bids, and bid tabulation/evaluations.	FE + 7		FE + 7	O CAUTION: If a formal written contract is the result of a successful bid or request for proposal, the successful bid or request for proposal and its supporting documentation must be retained for the same period as the contract. SEE item number 5.1.001 and 5.2.028.		
5.3.004	SVC230	Order - Acknowledgments	AV		AV			
5.3.008	SVC240	Purchasing Logs Log, register, etc., providing a record of purchase orders issued, orders received, and similar data on procurement status.	FE + 3		FE + 3			
5.3.005	SVC250	Packing Slips/ Shipping Lists	AV		AV			
5.3.002	SVC260	Freight Bills Paid	FE+3		FE+3			

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

5.3.003	SVC270	Freight Claims	AC + 2		AC + 2		AC = Resolution of claim.		
5.5.007	SVC350	Disputed Call Documentation Documentation relating to disputed long distance calls, including documents evidencing repayment by employees for personal long distance use.	FE + 3		FE + 3				
	SVC410	Off-Campus Shuttle Bus Schedules	AC+3		AC+3	O	AC=After completion of the semester schedule.		

Retention Codes (Field 7)	Archival Codes (Field 8)
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5.4.013	RSK110	Disaster Preparedness and Recovery Plans	US		US				
5.4.002	RSK120	Evacuation Plans Plans for evacuation of agency facilities in cases of emergency.	US		US				
5.4	RSK130	Institutional Bio Safety Committee (IBC) Minutes	PM		PM	I			
5.4.013	RSK 140	Insurance Policies	AC+7		AC+7		AC=Expiration or termination of policy according to its terms.		
5.4.001	RSK160	Accident Reports and Associated Documentation Accident or occupational disease reports (by supervisors and employees) and other associated reports required to be submitted to the Texas Department of Insurance or its predecessors or maintained internally on accident frequency.	CE + 5		CE + 5		29 CFR 1904.33. The Texas Department of Insurance retains copies of the reports submitted to it for 50 years.		
5.6	RSK170	Vehicle Accident Records	FE+3		FE+3				
5.4.010	RSK 210	Material Safety Data Sheets	AC		AC		AC = After sheets are updated or hazardous chemical no longer stored by agency, as applicable.		

Retention Codes (Field 7)	Archival Codes (Field 8)
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5.4.003	RSK220	Inspection Records Fire, safety, and other inspection records of agency facilities and equipment.	AC + 3		AC + 3	AC = Inspection, or date of the correction of the deficiency if the inspection report reveals a deficiency. CAUTION: Does not include inspection reports of building construction. SEE item number 5.2.028.		
5.4	RSK230	Fire Safety Management	US+5		US+5	29CFR 1910(L)		
5.4.004	RSK240	Fire Orders Orders issued by Fire Marshal to correct deficiencies in compliance with the fire code.	AC + 3		AC + 3	AC = Deficiency corrected.		
5.4	RSK300	Compliance Reporting-Environment: Federal, State, Local Governments	AC+10		AC+10	AC=Expiration of permit.		
5.4	RSK310	Indoor Air Quality-Testing, Monitoring & Remediation	40		40	29CFR 1910.1020		
5.4.008	RSK320	Hazard Communication Plans	US + 5		US + 5	Texas Health and Safety Code, 502.009(g).		
5.4.007	RSK330	Hazardous Materials Training Records Records of training given employees in an agency hazard communications program.	5		5	Texas Health and Safety Code, 502.009(g).		
5.4	RSK335	Hazardous Materials-Manuals, Policies, Procedures. Signage	US+5		US+5			

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			Agency	Storage	Total	9. Remarks				

5.4	RSK340	Hazardous Materials Management Records	30		30		29 CFR 1910 Subpart .H		
5.4	RSK345	Hazardous Materials-Remediation Records	40		40		29 CFR 1910.10.20.		
5.4	RSK350	Hazardous Materials-Exposure/Survey Forms	AC+30		AC+30		AC=Separation from the university. 29 CFR 1910.20		
5.4.009	RSK365	Workplace Chemical Lists	30		30		Texas Health and Safety Code, 502.005(d).		
5.4	RSK370	Water and Waste Water Permit Logs/Registers	PM		PM	I	TSLAC Local Schedule "Utility Services" 5025-13.		
5.4	RSK375	Water and Waste Water Records	AC+5		AC+5		AC=After completion of permit, report, compliance actions, analysis, action, etc. 30 TAC 290.46 (f) (3); 30 TAC 290.11.2 (4); 30 TAC 312.47(a) & (b);30 TAC 305.125 (11) (B); 30 TAC 319.7.		
5.4.012	RSK400	Security Access Records Records relating to the issuance of keys, identification cards, building passes, passwords, signed statements or similar instruments of access to agency or state facilities, equipment or automated systems.	AC + 2		AC + 2		AC = Until superseded, date of expiration, or date of termination, whichever sooner.		

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



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Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code	734	3. Agency Name						Lamar University					
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.				
			Agency	Storage	Total	9. Remarks							

5.4	RSK410	Biosafety-Manuals, Policies, Procedures, Signage	US+5		US+5			
5.4.007	RSK420	Bloodborne Pathogens Training	5		5		25 TAC 96; 29 CFR 1910.1030 (h) (2) (ii); Texas Health and Safety Code 502.009 (g)	
5.4.	RSK430	Bloodborne Pathogens-Exposure Control Plan	US+5		US+5		25 TAC 96.202; 29 CFR 1910.1030	
5.4	RSK440	Bloodborne Pathogens-Exposure/Incident/Injury/Records	AC+30		AC+30		AC=Student or employee separation from the university 29 CFR 1910.1030(h) (5) (iii); 29 CFR 1910.1020(d) (1) (ii)	
5.4	RSK450	Biohazard Incident Emergency Response	US+5		US+5			
5.4	RSK470	Biowaste Materials Management	30		30		29 CFR 1910 subpart H; 25 TAC 330.1219; 30 TAC 330.1219	
3.1	RSK610	Medical Records: Employee Accomodation (FMLA & ADA)	AC+10		AC+10		AC=Termination of employment. Medical Liability Act Guidelines; 22 TAC 165; By law-Health and Safety Code, Section 241.103; 29 CFR 825.500.	
3.1	RSK620	Medical Records: Surveillance and Exposure (Employee)	AC+30		AC+30		AC=Termination of employment. 29 CFR 1910.1020(d) (1) (ii)	
3.1	RSK630	Medical Records: Workers' Compensation (Employee)	AC+30		AC+30		AC=Termination of employment. 29 CFR 1910.1020(d) (1) (ii)	

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



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Form SLR 105C must accompany this form.

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2. Agency Code	734	3. Agency Name							Lamar University	
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total	9. Remarks				

4.7.008	RSP100	Sponsored Programs Grant Contracts and Accounting Records	AC+4	AC+4	O	AC=Date of submission of the final expenditure report period. OMB Circular A/110, individual grant terms, and internal audit requirements. CAUTION: Retention requirements may vary depending on the specific federal funding agency. Agencies must insure that records are retained for the appropriate retention period.		
4.7.008	RSP110	Sponsored Programs Grant Research Activity	AC+4	AC+4	O	AC=Date of submission of the final expenditure report period. OMB Circular A/110, individual grant terms, and internal audit requirements.		
4.1.002	RSP200	Institutionally Funded Faculty Research Grant Records	FE+3	FE+3	O	FE=End of the fiscal year in which the grant ended +3 years (FE+3.)		
	RSP300	Institutional Review Board (IRB) Minutes	5	5	I			
	RSP310	Institutional Review Board (IRB) Research Records	AC+3	AC+3	I	AC=Completion of research period.		

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



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Records Retention Schedule

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Form SLR 105C must accompany this form.

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2. Agency Code 734		3. Agency Name Lamar University							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total	9. Remarks			

4.7.008	RSP800	Non-Research Grant Records	AC=FE+3, or Completion of the grant plus the length of time required by the grant's term, whichever is longer.		AC=FE-3 or completion of the grant plus the length of time required by the grant's terms, whichever is longer.	O	AC=Completion of the grant plus the length of time required by the grant's terms. If no terms are specified or if the grant requires less than a 3-year retention, the records should be retained through the end of the fiscal year in which the grant ended + 3 years (FE+3). Some records are historical and require preservation; contact the University Archivist for assistance. CAUTION: Retention requirements may vary depending on the specific federal funding agency. Agencies must ensure that records are retained for the appropriate retention period.		
	RSP900	Non-Funded Grant Proposals	AC+3		AC+3		AC=Date of denial.		

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



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2. Agency Code	734	3. Agency Name							Lamar University		
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.		
			Agency	Storage	Total	9. Remarks					

	RTN110	<p>Radio and Television License Records This series provides a record of licensing of university campus radio stations and television channels (including distance education) with the Federal Communications Commission. Records may include: FCC applications; licenses and contracts; related correspondence and other records required by 47 CFR 73.3527. Federal regulations state that TV and radio licenses will ordinarily be renewed for 8 years unless the public interest, convenience and necessity will be served by an initial license or a renewal for a lesser term.</p>	AC+3		AC+3		AC=Expiration or cancellation of license or permit.		
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Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	I – Transfer to University Archives			
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	O – Review by University Archivist			



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2. Agency Code 734		3. Agency Name Lamar University								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival 9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.		
			Agency	Storage	Total					

	RTN120	Daily Broadcast Logs Series documents daily broadcast activities of the institutional radio station or television channel. Records include: log sheets showing time signed on and off; any delays in broadcasting; engineers name; announcer's name; and technical difficulties.	3				CAUTION: It is an exception to the retention period indicated that logs involving communications incident to a disaster or which include communications incident to or involved in an investigation by the FCC and about which the license has been notified, shall be retained by the licensee until specifically authorized in writing by the FCC to destroy them. In addition, logs incident to or involved in any claim or complaint has been fully satisfied or until the same has been barred by statute limiting the time for filing of suits upon such claims.	47 CFR 73.1840 (a). 47 CFR 73.1800 and 73.1820 for Station Logs.	
	RTN130	Chief Operator Records	AC+2		AC+2	O	AC=After completion of term / when superseded FCC Bulletin EB-18FM September 2009 Edition, Section I.C.		
	RTN140	Public Inspection File	2		2	O	FCC Bulletin EB-18 FM September 2009 Edition, Section I.F.		

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



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Records Retention Schedule

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Form SLR 105C must accompany this form.

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2. Agency Code	734	3. Agency Name					Lamar University				
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.		
			Agency	Storage	Total	9. Remarks					

SAD Code	Record Series Title	Agency	Storage	Total	Archival	106 No.	TSLAC ONLY Amend. No.
SAD100	Class Registration Lists and Course Status Records	AV		AV	CAUTION: Not to be confused with withdrawal records.		
SAD150	Classroom Scheduling Records	AV		AV	TSLAC Local Schedule JC 3900-06;		
SAD200	Examinations, Tests, Term Papers, and Homework Records	AC+2		AC+2	AC=End of semester.		
SAD300	Faculty Gradebooks	AC+2		AC+2	AC=End of semester TSLAC Local Schedule JC 3725-06 (b).		
SAD350	Request for Change of Final Grade / Appeals	AC+1		AC+1	AC=Decision on the request TSLAC Local Schedule JC 3725-06(b)		
SAD400	Course & Faculty Evaluations (Tenure Track Faculty)	AC+2		AC+2	AC=Date of grant or denial of promotion tenure track. TSLAC Local Schedule JC 3850-06.		
SAD450	Course & Faculty Evaluations (Non-Tenure Track Faculty)	AC+3		AC+3	AC=After course is completed. TSLAC Local Schedule JC 3850-06.		
SAD500	Student files-Departmental / Program/ Records (Undergraduate)	AC+2		AC+2	AC=Student separation from the department or university. TSLAC Local Schedule JC 3725-06.		
SAD501	Student Files-Departmental/Program Records (Undergraduate)-Accredited Program Requirments	AC+3		AC+3	AC=Student separation from the department or university. TSLAC Local Schedule JC 3725-06. AC+3 retention required by accredited academic programs such as Engineering.		

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



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2. Agency Code	734	3. Agency Name						Lamar University		
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total	9. Remarks				

	SAD550	Student Files-Departmental /Program Records (Graduate)	AC+6		AC+6	AC=Student separation from the department or university. Graduate students have 6 years to complete their degree.		
	SAD600	Student Teaching-Application File	AC+5		AC+5	AC=End of semester in which the student completed the Student Teaching exercise. AACRAO Schedule C (attributed).		
	SAD650	Student Teaching-Final Evaluations and Certification Recommendation	5		5	Benchmarking of other teaching programs in Texas show many have adopted a 5-year retention.		

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



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Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 734		3. Agency Name Lamar University						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival 9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total			

	SAP100	Academic Records/Transcripts	PM		PM	Records are permanent and require preservation and vital records protection. AACRAO Schedule C; TSLAC Local Schedule JC 3725-11.		
	SAP120	Final Grade Rosters	PM		PM	Records are permanent and require preservation and vital records protection. AACRAO Schedule C; TSLAC Local Schedule JC 3725-06.		
	SAP130	Change of Grade Forms	PM		PM	Records are permanent and require preservation and vital records protection. AACRAO Schedule C.		
	SAP140	Enrollment Correction Appeals	PM		PM	Records are permanent and require preservation and vital records protection.		
	SAP210	12 th Day Class Rosters (4 th day Class Rosters-Summer)	FE+3		FE+3	TSLAC Local Schedule JC 3900-03.		
	SAP220	Registration Withdrawl Forms & Authorizations	AC+3		AC+3	AC=End of academic term in which enrollment was terminated. AACRAO Schedule C TSLAC Local Schedule JC 3725-12.		
	SAP310	Grade Reports (Report Cards to Students)	AC+1		AC+1	AC=Date distributed. AACRAO Schedule C		

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



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Records Retention Schedule

SLR 105

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2. Agency Code	734	3. Agency Name							Lamar University	
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total	9. Remarks				

	SAP320	Academic Certification Records	5		5		TSLAC Local Schedule JC3725-11 (Notes on transcripts are permanent); benchmarking with other universities.		
	SAP330	Independent Study Records	AC+2		AC+2		AC=Student separation from the department or university.		
	SAP340	Theses and Dissertations Records	PM		PM	I	Send to the Library for permanent retention in the collection.		
	SAP400	Academic Actions (Probation, Suspension, Reinstatement)	AC+3		AC+3		AC=Graduation or date of last attendance. CAUTION: Refer to disciplinary action records.		
	SAP410	Disciplinary Action Document-Not Resulting in Expulsion	AV		AV		AV=End of academic term to which the records related. TSLAC Local Schedule JC 3900-02.		
	SAP430	Disciplinary Action Document-Resulting in Expulsion	3		3		TSLAC Local Schedule JC 3900-02.		

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



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Records Retention Schedule

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2. Agency Code	734	3. Agency Name							Lamar University	
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total	9. Remarks				

	SFA100	Financial Aid Program-Institutional Program Files	AC+3		AC+3	AC=End of the award year. 39 CFR 668.24; FSA Recordkeeping & Disclosure		
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<p><i>Retention Codes (Field 7)</i></p> <p>AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value</p>	<p><i>Archival Codes (Field 8)</i></p> <p>I – Transfer to University Archives O – Review by University Archivist</p>
<p>CE – Calendar Year End FE – Fiscal Year End</p>	<p>LA – Life of Asset MO – Months</p>
<p>PM – Permanent US – Until Superseded</p>	



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Records Retention Schedule

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2. Agency Code	734	3. Agency Name					Lamar University				
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.		
			Agency	Storage	Total	9. Remarks					

1.1.002	SFA110	Financial Aid Program—Audit Reports	AC+7	AC+7	AC=End of award year.	34CFR668.24 for Title V and HEA, 34 CFR 674.19(e)(3)(i) for Federal Perkins Loan, 34 CFR 675.19(b)(1) for Federal Work-Study (FWS), 34 CFR 690.82(a) for Federal Pell Grant, and 34 CFR 676.19(b) for Federal Supplemental Educational Opportunity Grant (FSEOG).
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Retention Codes (Field 7)	Archival Codes (Field 8)
AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	I – Transfer to University Archives O – Review by University Archivist
CE – Calendar Year End FE – Fiscal Year End	PM – Permanent US – Until Superseded
LA – Life of Asset MO – Months	



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2. Agency Code	734	3. Agency Name						Lamar University		
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total	9. Remarks				

4.5.003	SFA120	Financial Aid Program-Annual Financial Reports	AC+3	AC+3	AC= End of award year.	34CFR668.24 for Title V and HEA, 34 CFR 674.19(e)(3)(i) for Federal Perkins Loan, 34 CFR 675.19(b)(1) for Federal Work-Study (FWS), 34 CFR 690.82(a) for Federal Pell Grant, and 34 CFR 676.19(b) for Federal Supplemental Educational Opportunity Grant (FSEOG).	
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Retention Codes (Field 7)				Archival Codes (Field 8)	
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	I – Transfer to University Archives	O – Review by University Archivist
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded		



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2. Agency Code	734	3. Agency Name					Lamar University				
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.		
			Agency	Storage	Total	9. Remarks					

	SFA200	Financial Aid Program-Fiscal Records	AC+3		AC+3	AC=End of award year in which the report was submitted.	34 CFR 668.24(e)(1)(i) for Federal Title IV, 674.19(e)(3)(i) for Federal Perkins Loan, 675.19(b)(1) for Federal Work Study (FWS), and 676.19(b) for Federal Supplemental Opportunity Grant (FSEOG).	
	SFA210	Financial Aid Program-Fiscal Operations Report (FISAP) and FFEL and Direct Loan Reports	AC+3		AC+3	AC=Date of final repayment or cancellation.		
	SFA310	Direct Loan	AC+3		AC+3	AC= Date of final repayment or cancellation.		
	SFA320	Pell Grant	AC+5		AC+5	AC=End of award year.	34 CFR 690.82(a)	

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



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SLR 105

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2. Agency Code	734	3. Agency Name					Lamar University				
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.		
			Agency	Storage	Total	9. Remarks					

4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Agency	7. Storage	7. Total	8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
	SFA330	Perkins Repayment Records	AC+5		AC+5	AC=Date of final repayment or cancellation. Refer to SFA340	34 CFR 674.19(e)(3)	
	SFA335	Perkins IRS Skip Trace Information	AC+5		AC+5	AC=Date of final repayment or cancellation. Refer to SFA340		
	SFA340	Perkins Original Promissory Notes	AC		AC	AC= Until loan is satisfied or documents are needed to enforce obligation.	34 CFR 674.19(e)(4)	
	SFA400	Institutionally Funded Grants and Scholarship—Applications	AC+3		AC+3	AC=End of award year period.		
	SFA410	Institutionally Funded Grants and Scholarship—Recipient Lists	AV		AV	O		
	SFA430	Tuition and/or Fee Waivers and Exemptions	AC+3		AC+3	AC=End of award year.		
	SFA510	Student Financial Aid Files—Electronic	AC+5		AC+5	AC=End of award year. Retention meets departmental need and exceeds minimums set in 34 CFR 682.10; AACRAO Schedule H.		
	SFA515	Financial Aid Telephone Conversations	6 mos.		6 mos.			

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



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2. Agency Code	734	3. Agency Name							Lamar University	
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total	9. Remarks				

	SFA520	<p>Athletic Scholarship and Grant-In-Aid Award Records—NCAA Records This series is used to provide athletic departments with information pertaining to player eligibility and receipt of financial aid in the form of scholarships including grant-in-aid scholarships, to monitor accounts and to assist in complying with NCAA and conference rules and regulations. These records include: squad lists which furnish summary information; conference eligibility reports; team roster update sheets; scholarship count sheets showing who is on the schedule to receive aid; applications; nominee lists; eligibility questionnaires; eligibility reports which determine years of eligibility unused; credit voucher request sheet notes; and related documentation and correspondence.</p>	10		10				
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Retention Codes (Field 7)				Archival Codes (Field 8)	
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	I – Transfer to University Archives	
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	O – Review by University Archivist	



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2. Agency Code	734	3. Agency Name							Lamar University	
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total	9. Remarks				

	SFP100	FERPA (Family Educational Rights and Privacy Act) Access Policies	US		US			
	SFP200	FERPA (Family Educational Rights and Privacy Act)-Student Access Waivers	AC		AC	AC=Life of the record to which access waiver documentation applies. .		
	SFP300	FERPA (Family Educational Rights and Privacy Act) / PIA (Public Information Act) Records of Access to Information	AC		AC	AC=As long as disclosed record is maintained.	34 CFR 99.32(a)(2)	
	SFP400	FERPA (Family Educational Rights and Privacy Act)-Record Amendment Requests	2		2			
	SFP500	FERPA (Family Educational Rights and Privacy Act)-Protest of Record Statements	AC		AC	AC=Life of the record containing the contested information. 34 CFR 99.21(c)(1).		

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



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2. Agency Code	734	3. Agency Name							Lamar University	
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total	9. Remarks				

	SGR100	Graduation-Applications	AC+1		AC+1	AC=Graduation or last date of attendance.		
	SGR200	Graduation - Authorizations	AC+3		AC+3	AC=Graduation or date of last attendance.		
1.1	SGR300	Graduation - Diploma Administration	AC+1		AC+1	AC=Request fulfilled.		
	SGR400	Graduation-Lists (Registrar/Academic)	PM		PM			
1.1	SGR500	Graduation / Commencement Records (Ceremony)	10		10	I		

Retention Codes (Field 7)

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

CE – Calendar Year End
FE – Fiscal Year End

LA – Life of Asset
MO – Months

PM – Permanent
US – Until Superseded

Archival Codes (Field 8)

I – Transfer to University Archives
O – Review by University Archivist



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			Agency	Storage	Total	9. Remarks							

	SHC110	Operational Permits, Licenses, Certifications	AC+3		AC+3	AC=Expiration or cancellation of permit, license or certification. Texas Local Schedule HR 4750-05.		
	SHC120	HIPAA Documentation This records series documents disclosure of Protected Health Information (PHI) in accordance with the Health Information Portability and Accountability Act compliance regulations.	FE+6		FE+6			
	SHC130	Medical Waste Management	3		3	30 TAC 330.1004 (h) (4); Texas Local Schedule HR 4750-03; CSEE TCEQ Regulatory Guidance, August 2007: Texas Regulations on Medical Waste.		
	SHC140	Documentation of Meningitis Education	2		2	Texas Education Code Chapter 51.Z, §51.9191 (e)		
	SHC150	Healthcare Incident Reports	CE+3		CE+3	TAC 22 Chapter 11 §217.16		
	SHC160	Nurse Peer Review Programs	CE+3		CE+3	TAC 22 Chapter 11 §217.19		
	SHC161	Tracking of Nurse Errors	1		1	TSLAC 1.1.069 (Activity Reports); TAC 22 Chapter 11 §217.19 (a) (7)		
	SHC210	Patient Encounter Forms	AC+1		AC+1	AC=Entry into database.		
	SHC220	Patient Medical Records	AC+7		AC+7	AC=Date of last service. Or, retain until patient reaches age 21, whichever is longer.	22 TAC 165.1 (b)	

Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	I – Transfer to University Archives			
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1.1.069	SHC230	Patient Records Pick-Up Log	1		1			
	SHC240	Patient X-Rays	7		7		42 CFR 482.26 (d) (2); Texas Local Schedule HR 4800-25.	
	SHC250	Immunization Records and Forms	AC		AC		AC= 21 st birthday or 10 years following end of calendar year in which the consent form was signed, whichever is later. CAUTION: For immunization reports required by the Texas Education Code and the Texas Health and Safety Code, please follow RRS 1.1.007.	
	SHC310	Laboratory: Test Requisitions	2		2		42 CFR 493.1105 (1) and (3)-CLIA.	
	SHC320	Laboratory: Slides –Hematology (differential) and all others	2		2		42 CFR 493.1105; CLIA (no retention requirements stated).	
	SHC330	Laboratory: Tests-Pathology, Cytology, Histology	10		10			42 CFR 493.1101
	SHC340	Laboratory: Proficiency Testing	2		2		42 CFR 493.1105 (4) (CLIA).	URRS 195?

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	SHC410	Prescription Dispensation and Inventory Records	AC+2		AC+2	AC=The later of the date that the record was required to be created, the record was actually created, or the prescription was last filled, CAUTION: Refer to SHC430 for prescription records. By Federal regulation, inventories and records of all controlled substances must be maintained separately from all other records of the pharmacy.	21 CFR 1304.04(a); Health and Safety Code, Section 481.067(c); 37 TAC 13.207	
	SHC420	Drug Destruction Records	FE+3		FE+3	22 TAC 15 §303.3; Texas Department of State Health Services RRS (Texas State Records Retention Schedule).		

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	SHC430	<p>Prescription Dispensation and Inventory Records—Controlled and Dangerous Drugs Original hard copy of prescription and corresponding drug dispensation and refills administered by the department as required by the State Pharmacy Board.</p>	AC+2	AC+2		<p>AC=The later of the date that the record was required to be created, the record was actually created, or the prescription was last filled. CAUTION: Refer to SHC410 for inventory and other drug administration records. CAUTION: By Federal regulation, paper prescriptions for Schedule II controlled substances shall be maintained in a separate prescription file. Paper prescriptions for Schedules III, IV, V, controlled substances shall be maintained either in a separate prescription file for Schedules III, IV, and V controlled substances only are in such form that they are readily retrievable from the other prescription records of the pharmacy. Electronic records must be readily retrievable at the registered location if requested by the Drug Enforcement Administration (DEA) or other law enforcement agent. Electronic application storing prescription data must be capable of printing out or transferring the records. in a format AC=the later of the date that the record was required to be created, the record was actually created, or the prescription was last filled.</p>			
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			Agency	Storage	Total					

	SHC440	Pseudo Ephedrine Sales Logs	2		2		Combat Methamphetamine Epidemic Act of 2005		
1.1.069	SHC450	Prescription Pick-Up Log	1		1				
4.1.002	SHC510	Student Insurance Billing Documents	FE+3		FE+3				
4.1.002	SHC520	Student Insurance Reports	FE+3		FE+3				
	SHC530	Student Health Insurance Waivers	AC+1		AC+1		AC=End of semester for which the waiver applies. Retention Note: These are not billing or financial records. These are requests for health insurance waiver from international students on non-immigrant visas, as outlined UPPS 07.09.04. Waivers are requested each semester.		

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5.1.001	SHO100	Housing Contracts-Student Contracts	AC+4		AC+4	AC=Student separation from campus housing.		
5.1.001	SHO110	Housing Contracts-Summer Reservations	AC+4		AC+4	AC=Expiration of contract.		
	SHO200	Student Housing Judicial Record	AC+4		AC+4	AC=Expiration of contract, or resolution of incident whichever is later. CAUTION: Refer to UPD 120 for incidents referred to law enforcement. Refer to SAP400 for incidents which result in disciplinary action.		
1.1.069	SHO300	Student Housing Rosters	1		1			

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	SLI100	Student Organizations and Honor Societies This series documents the history, development, and policies of campus organizations. Records may include but are not limited to: constitutions and bylaws; publications (websites, newsletters, flyers, brochures, posters, and other publications); annual review forms; annual reposts; meeting minutes and supporting documentation; committee, subcommittee, task force records; Student Senate bill and resolution files; budgets; handbooks; officer and member rosters; scrapbooks; photographs; press releases; clippings; social media accounts; and related documentation and correspondence (including email that documents programs, activities, and events).	AV		AV	O	CAUTION: Faculty sponsors of student organizations should remind students that many of the electronic records that they create for the organization are records that must be retained and transferred to the University Archives, and that students must take care to retain these records in whatever manner the university decides is best.		
	SLI200	Student Publications and Performances	AC+3		AC+3	O	AC= End of semester for rosters, lists, events, and minutes. When superseded for by-laws and governing documents.		

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			Agency	Storage	Total					

	SMS100	Admissions-Incomplete Applications	AC+1		AC+1	AC=End of admission period/semester. AACRAO Schedule A, TSLAC Local Schedule JC 3700-01.		
	SMS200	Admissions-Students Enrolled	AC+3		AC+3	AC=Graduation or date of last attendance. CAUTION: International student academic records must be retained at least 1 year after final notice to Immigration and Naturalization Service.		
	SMS250	Admissions-Students Not Enrolled/Denied	AC+1		AC+1	AC=End of application term. CAUTION: International student academic records must be retained at least 1 year after final notice to Immigration and Naturalization Service.		

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			Agency	Storage	Total								

	SMS300	Admissions-International Students Enrolled	AC+3		AC+3	AC=Graduation or date of last attendance. CAUTION: Must be retained at least 1 year after final notice to Immigration and Naturalization Service.	8 CFR 214.3 (g), 22 CFR	
	SMS350	Admissions-International Students Not Enrolled/Denied	2		2			
	SMS400	Residency Affidavits and Forms	AC+6		AC+6	AC=Date of submission. Not for residency classification forms submitted by applicants as a part of the admissions process. Refer to URRS 108 and URRS 109.	Texas Education Code §54.052	
	SMS500	Admissions/Enrollment Report	PM		PM	TSLAC Local Schedule JC 3900-07; AACRAO Schedule E (by association).		

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	SRR100	Student Recruitment Records	3		3	CAUTION: For recruitment of individual students refer to SRR100. For recruitment of athletes into the institution's intercollegiate athletics program, Refer to ICA200.		
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	SSV100	Client Records-ADA/Disability, Counseling, Psychological, and Psychiatric	AC+7		AC+7	AC=Last contact with client. CAUTION: For patients less than 18 years of age, when last treated the records must be retained until the patient reaches age 21 or for seven years after the last treatment, whichever is longer.		
	SSV150	Client Records -Non-Medical Health Services	AC+7		AC+7	AC=Last contact with client (or retain until client reaches age 21, whichever is longer). 22 TAC 165.		
	SSV200	Job Fairs and Student Placement/Recruiting Records	2					
4.1.002	SSV400	Recreation -Facility /Program Membership Forms	FE+3		FE+3			

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1.1.069	SSV410	Recreation-Attendance and Use Logs	1		1			

Retention Codes (<i>Field 7</i>)				Archival Codes (<i>Field 8</i>)	
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	STS100	National Exams-Scores (Entrance Exams)	AC+5		AC+5	AC=Last attendance. AACRAO Schedule C.		
4.2.002	STS200	National Exams-Test Administration This series provides a record of the services rendered to clients by administering tests required of students seeking admission to various programs or seeking to substitute already acquired knowledge for formal college courses.	FE+3		FE+3			
	STS300	State Required Academic Assessment Records (THEA: Texas Higher Education Assessment)	AC+5		AC+5	AC=Student separation from University. AACRAO Schedule B		
	STS400	Credit by Exams (AP, CLEP, Departmental, IB, SAT II)	AC+3		AC+3	AC=Graduation or date of last attendance.		
	STS500	Institutional Exams (e.g. Engineering , Math)	AC+5		AC+5	AC=Date of last attendance. AACRAO Schedule C.		

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	STU100	Course Registration and Status Records	AV		AV	CAUTION: Not to be confused with withdrawal records. Refer to STU110		
	STU110	Administrative Course Change Forms (Adds/Drops)	AV		AV			
	STU120	Holds and Encumbrances (Academic) Documents used to place and remove holds on registration, student services, or the release of transcripts or other academic data until the subject the hold/encumbrance takes a specific action.	AC		AC	AC=Date of release.		
	STU130	Registration Cancellations	FE+3		FE+3	FE=Fiscal year end.		
	STU140	Student Records-Military Veterans/VA Files	AC+3		AC+3	AC=Graduation or last attendance. Refer to URRS-360 for Hazelwood Act documentation and URRS-361 for records of US Department of Veterans Affairs certification.	38 CFR 21.4209	
	STU145	Internship Applications—Not Enrolled/Denied Applications for internship programs for which student was denied or did not enroll.	AC+1		AC+1	AC=End of academic term in which internship occurred. Refer to STU150 for other internship program records.		

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	STU150	Internship Program Records	AC+5		AC+5	AC=End of academic term in which the internship took place. Refer to STU145 for internship applications for which student was denied.		
	STU210	Personal Data Update/Name Change Records	AV		AV	For other personal data update records (Change of address forms, race/ethnicity questionnaires, and requests and authorizations to change other demographic data), refer to STU300.		
	STU300	Personal Data Update Records	AC+1		AC+1	Change of address forms, race/ethnicity questionnaires requests and authorizations and other demographic data, and similar source documentation used to update personal data information on transcripts or other student records.		
	STU310	Routine Requests: Transcript Requests Request for transcripts to be provided to student or sent to other institutions.	AV		AV			
3.1.038	STU320	Public Access/Non Disclosure Form (Student Privacy Election) Student request to opt out of directory information disclosure.	AC		AC	AC=Until termination of non-disclosure request.	34 CFR 99.37(b)	

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	STU410	Non-University Student Records This series documents and tracks the application, selection, and progress in special instructional programs in elementary through high school and non-institution students belonging to special, minority, or disadvantaged groups.	AC+3		AC+3		AC=Student separation from program.		
	STU415	Non-University Student Program Administration Records-Policy and Program Development Records This series documents the administrative activities of special instructional and support programs directed to serve elementary through high school and non-institution students belonging to special, minority, or disadvantaged groups.	PM		PM	O			

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1.1.058	UAD110	Board of Regents-Minutes and Resolutions	PM		PM	I	One copy of all Board minutes should be sent directly to University Archives for long-term retention period. All departmental copies are considered convenience copies.		
1.1.004	UAD120	Legislative Appropriation Requests Including any supporting documentation created and/or used to justify and support legislative appropriations requests by an agency.	AC + 6		AC + 6	I	AC = September 1 of odd-numbered calendar years. ARCHIVES NOTE: The archival requirement is met by sending the required copies of the requests to the Texas State Publications Depository Program, Texas State Library and Archives Commission. Only copies of supporting documentation submitted to the Legislative Budget Board are archival.		
1.1.070	UAD210	Academic Policies	PM		PM	I	Records are permanent and require preservation; contact University Archives to transfer superseded policies.		

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1.1.071	UAD220	Academic Policies-Working Files	AC+3		AC+3	O	AC=Completion of new/updated policy. Some records have historical value and require preservation; contact the University Archives after the active retention period has expired.	
1.1.070	UAD230	Agency Rules, Policies, and Procedures - Final Manuals, guidelines, administrative rules, or similar records distributed internally for the use of employees or externally to the public or those individuals or entities regulated by an agency that sets out the rules, policies, and procedures that govern an agency's programs, services, or projects.	AC + 3		AC + 3	O	AC = Completion or termination of program, rules, policies, or procedures. SEE ALSO Agency Rules, Policies and Procedures - Working Files, 1.1.071.	
1.1.071	UAD240	Agency Rules, Policies, and Procedures - Working Files Working files used in the development of manuals, guidelines, administrative rules, or similar records distributed internally for the use of employees or externally to the public or those individuals or entities regulated by an agency that sets out the rules, policies, and procedures that govern an agency's programs, services, or projects.	AC + 3		AC + 3	O	AC = Completion or termination of program, rules, policies, or procedures. SEE ALSO Records Series Item Number 1.1.070.	

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1.1.068	UAD310	Reports-Academic Statistics Annual statistical reports related to academic subjects such as admissions reports, enrollment statistics, grades, graduates/degree statistics, racial/ethnic composition, and other education-related matters submitted to the governing body, state or federal agencies or accrediting organizations.	PM		PM	I		
1.1.065	UAD330	Reports-External Research and Surveys	AC		AC	O	AC=Until report has fulfilled the purpose for which it was created.	
1.1	UAD340	Reports-Institutional Survey and Reporting (Required by Outside Entities)	PM		PM	I		
1.1.066	UAD350	Reports—State Legislative Reporting Requirements	AC+6		AC+6	I	AC=September 1 of odd-numbered calendar years ARCHIVES NOTE: The archival requirement is met by sending the required copies of the reports to the Texas State Publications Depository Program, Texas State Library and Archives Commission.	
	UAD410	Accreditation Reports-SACS	PM		PM	I	TSLAC Local Schedule JC 3800-01	

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



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			Agency	Storage	Total	9. Remarks				

	UAD420	<p>Professional Accreditation Reports 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 evaluation report based on the packet and on-site inspection, which is used to determine accreditation for the units and their programs. This series may include but is not limited to: self-evaluation reports; final reports sent to accreditation organization; accreditation organization evaluation report; and related documentation and correspondence.</p>	PM		PM	I			
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Retention Codes (Field 7)				Archival Codes (Field 8)	
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	I – Transfer to University Archives	O – Review by University Archivist
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded		



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			Agency	Storage	Total	9. Remarks				

	UAD430	<p>Professional Accreditation Records— Working Files</p> <p>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 evaluation report based on the packet and on-site inspection, which is used to determine accreditation for the units and their programs.</p> <p>The series may include but is not limited to statistical data; working papers; and related documentation and correspondence.</p>	AC		AC	O	AC=End of 2 accreditation cycles.		
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Retention Codes (Field 7)				Archival Codes (Field 8)	
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			Agency	Storage	Total	9. Remarks				

1.1	UAD440	<p>Cooperative Programs Records This series documents the institution's participation in cooperative and shared educational or research programs. Such programs may share research facilities and resources or instructional programs such as programs permitting student matriculation at member institutions. This series may include but is not limited to: information on requirements and application procedures; committee minutes; meeting agendas; and memos of interpretation and understanding.</p>	PM		PM	I			
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Retention Codes (<i>Field 7</i>)				Archival Codes (<i>Field 8</i>)	
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			Agency	Storage	Total					

1.1	UAD500	Cooperative Program Records—Program Records This series documents the institution's participation in cooperative and shared educational or research programs. Such programs may share research facilities and resources or instructional programs such as programs permitting student matriculation at member institutions. This series may include but is not limited to: applications and eligibility certificates; working papers; fiscal records; and related documentation and correspondence.	AC+7		AC+7		AC=Termination of program or agreement.		
1.1	UAD510	Awards Administration and History Records This series documents the process of selecting institutional faculty, staff, students and alumni to receive awards, fellowships, and scholarships based on merit or achievement. Includes: eligibility terms and selection criteria, award history and information on funding sources, award notifications, summary lists of winners, and biographies of winners.	AC		AC	O	AC=Termination of award. ARCHIVES NOTE: Only institutional awards merit archival review. Department-level awards recognizing employee or student achievement do not need to be reviewed for archival value. Refer to RRS 1.1.019 for press releases.		

Retention Codes (Field 7) AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value CE – Calendar Year End FE – Fiscal Year End LA – Life of Asset MO – Months PM – Permanent US – Until Superseded	Archival Codes (Field 8) I – Transfer to University Archives O – Review by University Archivist
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1.1	UAD530	Event Planning Records-University Special Events This series documents the efforts of a college or unit to provide informative sessions, short courses, workshops, training programs, excursions, celebratory events for members of the institution and committees it serves. This series may include but it not limited to: materials on planning and arrangements; reports; promotional and publicity materials; press releases and news clippings; photographs; presentation materials and handouts; schedules of speakers and activities; registration and attendance lists; participant evaluations; and related documentation and correspondence.	AC+4		AC+4	O	AC=Completion of the event. Some records have historical value and require preservation; contact the University Archives after the active retention period has expired.		
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Retention Codes (Field 7)				Archival Codes (Field 8)			
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1.1	UAD535	Gift Records—Department or Program This series documents potential or realized private, corporate, or public agency funding to a department or program, including endowments, trusts, and funds raised by support/"friends groups." This series comprises award guidelines, memoranda of understanding, records of fund disbursements, and related documentation and correspondence.	7		7		CAUTION: For records of major gifts refer to UAD540 (Gift Records-Institutional). For donor files refer to ADV130(Donor Files). For on-going contracts and agreements refer to RRS 5.1.001.		
1.1	UAD540	Gifts Received—Institutional This series documents potential or realized private, corporate, or public agency funding to the institution, including endowments and trusts. This series includes letters and agreements of gifts, copies of bequest instruments, and wills from individuals or estates and related documentation and correspondence.	PM		PM	I	CAUTION: The name or other identifying information about a donor may be withheld from public disclosure by the Public Information Act. Government Code SEC. 552.1235.		

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			Agency	Storage	Total	9. Remarks				

1.1	UAD550	<p>Lecture Series Records This series documents the development and history of special lectures and continuing lectureships devoted to a variety of topics and disciplines sponsored by the institution. This series my include but is not limited to: information on funding, financial support, and honorary records; patron information; information on catering arrangements; and related documentation and related correspondence.</p>	5		5		O	<p>CAUTION: Refer to UAD530 for records of event planning and administration.</p>		
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			Agency	Storage	Total	9. Remarks				

5.6.009	UPD110	Parking Permits or Assignments This series documents the issuance of permits for on-campus parking. This series may include but is not limited to: annual permit cards; temporary permits; parking permit reports; and related documentation and correspondence.	AC+3		AC+3		AC= Until superseded or permit expires.		
1.1	UPD120	Campus Crime Reporting (Clery Act) A written, easily understood crime log that reports the nature, date, time, general location, and disposition of the complaint (if known) of crimes investigated by campus police.	7		7		20 U.S.C. 1092 (f); 34 CFR 668.46		
	UPD130	Clery Act Reporting-Annual Security Report Created pursuant to the Clery Act.	7		7	O	20 USC Section 1092 (f); 34 CFR Section 668.46 NOTE: This record may possess ongoing administrative value to the creating department for research purposes.		
	UPD200	Profiling Records	CE+3		CE+3		Based on TSLAC 1.1.064		
	UPD210	Case Cards (Incoming Cards)	2		2		TSLAC Local Schedule PS 4125-01.		

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	UPD220	Communication Logs Records of internal communication including telephone and radio logs.	30 days		30 days			
	UPD240	Case Records-Without Arrest [Empty]	2		2		TSLAC Local Schedule PS 4125-01.	
	UPD260	Case Records-With Arrest Report Arrest reports and fingerprints on each person arrested and charged with a felony or a misdemeanor not punishable by a fine only. Report includes the name (including aliases), date of birth, and physical description of the offender; the name of the arresting agency; the arrest charged and whether it is a felony or a misdemeanor; the date of arrest; and the date and exact disposition of the case by the agency.	75		75		May be destroyed upon date of death of individual, if known, Refer to UPD 265 for Class C misdemeanors or other violations punishable by fine only. CAUTION: If the arrest report does not provide the information listed in the record description, documents from offense investigation records (see UPD267) sufficient to provide the information must be retained 75 years or until date of death of the individual.	
	UPD265	Offense Records—Class C Misdemeanors Arrest reports and citations for Class C misdemeanors and unclassified violations of state law or local ordinance punishable by fine only, such as, Minor in Possession (MIP), Minor in Consumption, and possession of drug paraphernalia.	6 months		6 months			

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	UPD267	<p>Offense Records—Class A and B Misdemeanors and State Jail Felonies Cases cleared by the conviction or acquittal of the person arrested or cited, by the dismissal of charges against the person, or by the entry on the record of a court by a prosecuting attorney of a nolle prosequi. Includes offense and supplemental offense reports; investigation reports and notes; witness statements; latent fingerprints; results of chemical analysis and ploygraph tests; crime scene, mug shot, and other photographs; laboratory reports; citations; affadavits; criminal process; victim impact statements; and other records relating and customary to investigation of criminal offenses or other violation of state law or local ordinance.</p>	2		2		<p>CAUTION: Records of cases not cleared must be retained until the statute of limitations has expired.</p> <p>NOTE: Records may be destroyed upon the death of the individual if known.</p>		
	UPD270	TCIC/TLETS Stolen Property Records	2		2		TSLAC Local Schedule PS 4175-12.		

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			Agency	Storage	Total						

	UPD280	Accident Reports—Adults	AC+3		AC+3		AC=Date of report if no claim is filed, refer to RRS 4.7.005 Refer to RRS 5.4.001 for accident or occupational disease reports by supervisors or employees.	Civil Practice and Remedies Code, Section 16.001 for Accident Reports—Minors. 29 CFR 1904.33 for Accident Reports and Associated Documentation.	
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Retention Codes (Field 7)	Archival Codes (Field 8)
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CE – Calendar Year End FE – Fiscal Year End	PM – Permanent US – Until Superseded
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			Agency	Storage	Total					

	UPD300	Accident Reports—Minors Reports of accidents to minors on university property, or at university events, or in any situation in which the university could be party to a lawsuit.	AC+3		AC+3		AC=Date minor reaches majority age, if no claim is filed. If claim is filed, refer to RRS 4.7.005.	Civil Practice and Remedies Code, Section 16.001 for Accident Reports—Minors. 29 CFR 1904.33 for Accident Reports and Associated Documentation	
1.1.069	UPD400	Facilities Access Logs (i.e. routine facilities checks)	1		1				

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	ICA100	<p>Equity Athletics Disclosure Act (EADA) Records</p> <p>The Equity in Athletics Disclosure Act requires co-educational institutions of postsecondary education that participate in a Title IV, federal student financial assistance program, and have an intercollegiate athletic programs, to prepare an annual report to the Department of Education on athletic participation, staffing, and revenues and expenses, by mens' and women's teams.</p>	AC+6		AC+6	O	<p>AC=Submission of the report. No legal requirements. NCAA relies solely on institutional retention policies; it does not set retention requirements.</p> <p>Some records may have historical value and require preservation; contact the University Archives, after the active retention period has expired or when older records or in need of preservation.</p>		
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	ICA200	<p>Recruiting Records This series documents the recruitment of athletes into the institution's intercollegiate athletic program. The series also provides a record of the recruitment process for prospective players created by the institution to comply with NCAA, and conference rules and regulations. Typical records include: the institution's questionnaire forms with personal, scholastic, sport, general, and transcript release information; information request for request cover sheets; grade transcripts; Information for Certification of NCAA Freshman Athletics Eligibility Compliance (with By Law 501-j forms, number 40-C); letters of intent; copies of admission forms and materials; performance reports, telephone and conversation notes, mailing lists and related documentation and correspondence. Records of recruiting travel, including detailed itinerary information listing who traveled where and for how long.</p>	AC+5		AC+5		AC=End of eligibility.		
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	ICA300	Student Athlete Academic-Athletic Eligibility Records Academic progress reports to provide a record of verification by intercollegiate athletics of student athletes' academic progress to the NCAA or NAIA.	AC+10		AC+10		AC=Student separation from the department or university.		
	ICA400	Student Athletes-Individual Athlete Records This series includes confidential records of the athletic history of each athlete who has competed at the institution. Frequently this series is a continuation of the recruitment file and includes recruitment records if an athlete signs a letter of intent records may include but may not be limited to: academic major information, including performance reports, admissions verification reports, academic transcripts, and financial aid information, recruitment information documents, and related documentation and correspondence. For records relating to the public profile of the athlete use ICA400	AC+5		AC+5	O	AC=Student separation from the department or university.		

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	ICA405	<p>Individual Athletes Records—Public Profile This series documents the athletic history of each athlete who has competed at the institution. Frequently, this series is a continuation of the recruitment file and includes recruitment records if an athlete signs a letter of intent. Records may include and may not be limited to: academic major information including performance reports, admissions verification reports, recruitment information documents, media articles; photographs, release of information forms, personal data questionnaires, records of awards, and related documentation and correspondence. This series does not include confidential records of the athlete, which are held under ICA400.</p>	PM		PM	I		
	ICA410	<p>Student Athletes—Medical Records This series documents the medical history of each athlete before and during his/her attendance at the institution.</p>	AC+7		AC+7		AC=Last date on which service was given or until the patients' 21 st birthday whichever is later.	22 TAC 165.19(b).

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	ICA420	<p>Positive Drug Test Records This series is used to provide the athletic director with a record of the positive results of drug testing done on student athletes. These records include: lab reports; interpretation; and related documentation and correspondence.</p>	AC+5		AC+		AC=End of eligibility.		
	ICA430	<p>Intercollegiate Athletic Insurance Claim Records This series documents medical treatment services rendered off-campus for practice or playing related injuries or illnesses which are eligible for partial payment by intercollegiate insurance. This series may include but is not limited to copies of policies; accident reports; annual insurance questionnaires; notes; claim forms; negotiations; payment of insurance records; and related documentation and correspondence.</p>	AC+7		AC+7		AC=Last date on which service was given or until the patient's 21 st birthday, whichever is later.		

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	ICA500	<p>Sport-Game Records This series documents the practice, playing, and attendance statistics about each game and the season for each sport by playing year. This series may include but is not limited to: player academic statistics; attendance figures; player training charts; season and game player statistics; recruitment records; special team statistics; rankings; awards information; NAIA and NCAA game statistics; media releases; all-conference nominations; spring and fall camp depth charts; numerical rosters; media guides; narrative reports on games and scrimmages; final team statistics for each game; NAIA and NCAA official scoring summaries, play-by-play written reports; and related documenttion and correspondence. For records relating to the public profile of the athlete use ICA405.</p>	75		75	0			
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			Agency	Storage	Total	9. Remarks				

	ICA510	Sport-Practice Schedule/Reports This series is used to monitor practice time for athletic teams and assist in complying with NCAA, NAIA and conference rules and regulations. This series contains team rosters indicating time spent in: practices; meetings; training and conditioning; and competition.	5		5				
	ICA520	Sport-Away Game Arrangments/Travel Itinerary This series is used to provide a reference record of arragements made for and schedules of past games. This series may include but is not limited to: team practice schedules; team position assignments/depth charts; itinaries; bus lists; notes; and related documentation and correspondence.	AC+5		AC+5		AC=End of sports season.		

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



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			Agency	Storage	Total	9. Remarks					

	ICA530	Sport-Competition Contracts and Scheduling Contracts This series documents competition schedules set up with other institutions by coaches and the athletic director. This series may include but is not limited to: correspondence; phone notes; contracts; final schedules; and related documentation and correspondence.	AC+7		AC+7		AC=Expiration of contract.		
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Retention Codes (<i>Field 7</i>)				Archival Codes (<i>Field 8</i>)					
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4.1.002	ICA700	<p>Ticket Sales Records This series documents the printing, selling, distribution, and accounting of tickets for university-sponsored athletic events where tickets are sold for admission. A portion of athletic event receipts is shared with visiting teams. Records may include: ticket stock orders; ticket type reports; ticket purchase manifest forms; box office balance sheets; ticket printing and control records; season ticket sales lists; receipts and orders for mail, phone, or in-person purchase of tickets; ticket sales summary sheets and reports; free ticket sign-up sheets; lists and reports of free tickets distributed to patrons, contributors, and others; deposit receipts; and related documentation and correspondence.</p>	FE+5		FE+5		<p>CAUTION: Records should be kept in compliance with NCAA or NAIA requirements, as applicable.</p> <p>Refer to FIN100 for ticket sales and reconciliation records for non-athletic events.</p>	
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			Agency	Storage	Total			

5.1.001	ICA750	Concession/Lease /Licensing Agreements This series documents the sale of concessions at sports events and the use of university trademarks for the sale of institutional and NCAA-licensed merchandise at sporting events.	AC+4		AC+4		AC=Termination of the lease/agreement. See LEG200 and LEG400 (Contracts and Licensing Agreements),		
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	LEG100	Real Property Records Includes purchase contracts, gift agreements, deeds, wills, codicils, estate inventories, probate records, minute orders (authorizing purchase, gift, or sale of a portion of an asset), restrictions, judgments, title policy, or opinions of title, closing documents, surveys, maps, plats, property descriptions, surety bonds, and related correspondence.	LA + 10		LA + 10	O	Records have historical value; long-term preservation storage may need to be addressed.		
5.1.010	LEG110	Facilities Licenses, Permits, and Certificates Licenses and permits (non-vehicles) required for the university to provide services and maintain facilities, including insurance requirements. Typical records include: Licenses, permits, and certificates for activities such as tree trimming, tree removal, street cutting, excavation, road closure, special events. Also includes insurance certificates.	AC+2		AC+2		AC=Expiration, cancellation, revocation, or denial. CAUTION: Does not include parking permits. Refer to 5.6.009		

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5.1	LEG200	Trademarks Licensing Records This series documents the legal authority for outside entities to use the logos and other symbols constituting the registered trademarks of the institution. The records consist of folders for each vendor or individual seeking legal use of institutional trademarks for any reason.	AC+7		AC+7		AC=Expiration of license period.		
5.1	LEG300	Intellectual Property Agreements Includes license agreements, know-how agreements, and other contractual agreements resulting from the licensing of technology or the transfer of intellectual property	AC+7		AC+	O	AC=Completion of all terms and extensions of the agreement. CAUTION: Does not include patent records refer to URRS 277	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. 11541.11541.	
5.1.001	LEG400	Contracts and Leases (including Service Contracts)	AC+4		AC+4	O	AC=Expiration of contract. Some records related to leasing space have historical value and require preservation; contact University Archives when the active retention period has expired.		
5.1	LEG410	Contracts and Agreements Records-Internal	AC+2		AC+2		AC=Expiration of contract.		

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5.1.017	LEG420	Contract Log	FE+3		FE+3			
5.1	LEG450	Memoranda of Understanding and Waivers	AC+4		AC+4		AC=Expiration of agreement.	
5.1	LEG500	Waivers: Hold Harmless, Liability, and Release Records	AC+4		AC+4		AC=Conclusion of event	
1.1.014	LEG600	Legal Opinions and Advice	AV		AV	O	Some records have historical value and require preservation; contact the University Archives when the active retention period has expired.	
1.1.048	LEG610	Litigation Files	AC+1		AC+1	O	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. Some records have historical value and require preservation; contact the University Archives when the active retention period has expired.	

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1.1.069	LIB110	Patron Attendance and Use Logs	1		1			
1.2.013	LIB120	Records Control Materials/Location Guides	AC		AC		AC=When control aid is updated, revised, or no longer needed.	
6.2	LIB200	Library Catalog Catalog of bibliographic records used as a guide to library holdings.	US		US		The disposal or supersession of library catalog records need not be documented through destruction authorizations (1.2.001) or in records disposition logs (1.2.010).	
6.2	LIB205	Library Materials Control Records Includes records of the cataloging of library material.	US		US		AC=Catalog updated. CAUTION: Does not include the library catalog. Refer to LIB200 The disposal of library material control records need not be documented through destruction authorizations (1.2.001) or in records disposition logs (1.2.010).	
2.2.016	LIB210	Electronic Resource Management/License Management	LA+3		LA+3			

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	LIB310	Acquisitions Records Typical records include standing order cards or lists indicating the name and address of the requestor; book titles; transaction date; invoice number; and related documentation and correspondence.	AC		AC	AC= catalog updated CAUTION: Refer to RRS 4.7.004 (Capital Asset Records) for records documenting purchase of library materials.		
1.1.057	LIB330	Circulation Records-Borrowing & Use This series documents the borrowing of circulating library materials by qualified patrons. This series may include but is not limited to: the name and identification of the borrower; the titles of the materials borrowed; the due date; overdue and fine payment notations; and related documentation and correspondence.	AC		AC	AC=Until the transaction is completed. The disposal of circulation records need not be documented through destruction authorizations (1.2.001) or in records disposition logs (1.2.010).		
4.2.002	LIB332	Circulation Records-Courtesy Borrowers' Records Records documenting guest borrowers of library materials. Records may include guest borrowers name, address, telephone number, company or institution, and patron status.	AC		AC	AC=Expiration of borrowing privileges and clearing of fines. CAUTION: If borrower application serves as an agreement between the borrower and the institution (e.g., to follow library rules), refer to RRS 5.1.001.		

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4.2.002	LIB340	Inter-Library Loan (ILL) Records This series documents requests made of the institutions within the university system for materials by outside institutions and also institutions requests from other library systems. This series applies to circulating library resources only. (Not to archival, special collections, or museum materials).	FE+3	FE+3			CAUTION: Records Management Officers should insure that ILL records maintained by a third-party vendor are retained in accordance with this record series.	
6.2	LIB350	Reference Records This series documents requests for information about, or access to, items within the institution's collections. This series may include but is not limited to: reference request forms, general email correspondence, disposition of or time spent fulfilling the request, call slips, (also called pull slips), and related documentation and correspondence.	FE+3	FE+3				

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1.1.057	LIB360	Serials Records The series documents the receipt of materials acquired by the library. Typical records include periodical check-in cards, shelf-list cards; payment cards; serials data input work forms sheets; data base reports; item records; and related documentation.	AC		AC		AC=After cataloging complete		
	LIB410	Special Collections: Accession Register	PM		PM	I			
	LIB420	Special Collections: Collection /Artifact and Document Loan Register	PM		PM	I			
	LIB430	Special Collections: Collection/Donor Files	PM		PM	I	Refer to RRS 2.1.011 (Finding aids, indexes, and tracking systems) or archival finding aids.		
	LIB440	Special Collections: Event and Exhibit Records	PM		PM	I			
	LIB450	Special Collections: Patrons/Visitor Logs	PM		PM	I			

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6.2	MUS492	<p>Collection or Artifact Loan Records Artifact and material loans contracted between units of the institution or between the institution and either other institutions or individuals. These records include: signed and legally binding agreements for incoming and outgoing loans between the collection administrators; receipts for loans and return of materials to legal holder; and related forms, documentation and correspondence.</p>	PM		PM				
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Retention Codes (Field 7)

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INDEX

RECORDS RETENTION SCHEDULE ABBREVIATIONS

- ADM=Administrative
- ADV=Advancement, Alumni, and Public Relations
- CHD=Child Development Center
- CUR=Curriculum
- EDP=Electronic Data Processing
- EQS=Equipment and Supplies
- FCL=Facilities Management
- FIN= Fiscal / Financial
- ICA= Intercollegiate Athletics
- LEG=Legal Records
- LIB=Library and Special Collections
- PER=Personnel
- RSK=Risk Management
- RSP=Research and Sponsored Programs
- RTN=Radio and Television
- SAD=Student Academic Departments
- SAP= Student Records: Academic Progress

- SFA=Student Financial Aid
- SFP= Student Records: FERPA
- SGR= Student Records: Graduation
- SHC=Student Health Center
- SHO=Student Housing
- SLI=Student Life
- SMS=Student Admissions
- SRR=Student Recruitment and Retention
- SSV=Student Services
- STS= Student Records: Testing
- STU= Student Records: Administration
- SVC=Support Services
- UAD=University Administration
- UPD=University Police Department
- MUS=Museum
- MAR=Marketing

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