



STATE OF TEXAS Records Retention Schedule

SLR 105
Rev. 2021-07

Retention Codes (field 7)

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

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US – Until Superseded

Archival Codes (Field 10)

A/I – Transfer to State/University Archivist
R/O – Review by State/University Archivist
E – Exempt from archival review and transfer

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1. Agency Code: 710			2. Agency Name: Texas A&M System Office								
3. Agency Item No.	4. Record Series Item No.	5. Record Series Title	6. Description	7. Ret. Code	8. Retention Period			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
02.203.10	2.2.010	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 backup, etc.	US	3					CAUTION: Does not include technical documentation of procedures necessary for reading or processing of electronic records. See item number 2.1.009.	
02.204.10	2.2.011	Batch Data Entry Control Records	Forms and logs used to reconcile batches submitted for procession against batches received and processed.	AC				AC = When reconciliation confirmed.			
02.205.10	2.2.012	Output Records for Computer Production (Mini and Mainframe)	Reports showing transactions that were accepted, rejected, suspended, and/or processed.	AV							
02.206.10	2.2.013	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=No longer needed as an audit trail for any records modified			



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02.207.10	2.2.014	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						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).	
02.208.10	2.2.015	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 a usage of a state-owned computer.	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).	
02.209.10	2.2.016	Software Registrations, Warranties and Licensee Agreements		LA	3						
03.100.10	3.1.001	Applications for Permanent 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 ad.		2					Includes Temporary Employment	29 CFR § 1602.31 (State Agencies); 29 CFR § 1602.49(a) (State Universities)



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03.101.10	3.1.002	Applications for Permanent 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 ad.	AC	5			AC=Termination of Employment		Includes Temporary Employment and Certificate of Age (minor workers)	
03.102.10	3.1.006	Employee Counseling Records	Notes, memoranda, or reports relating to the counseling of an employee for work-related, personal, or substance abuse problems.	AC	3			AC = Termination of Counseling		Period is AC+7 if counseling provided by, and records kept by a licensed psychologist as required by 22 Tex. Admin. Code § 465.22 (d)(2).	
03.103.10	3.1.011	Employee's Insurance Records	Copies of information relating to the selection by employees of life, disability, health, and other types of insurance offered by TAMUS to its employees.	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	
03.104.10	3.1.012	Employment Opportunity Announcements	Internal or external announcements or advertisements of job openings, promotions, training programs, or opportunities for overtime.		2						29 CFR § 1602.31 (State Agencies) 29 CFR § 1602.49(a) (State Universities)
03.105.10	3.1.013	Employment Contracts	Executed, renewed, or amended on or after September 1, 2015.	AC	7			AC=Expiration or termination of the contract according to its terms.			Tex. Gov't Code 441.1855
03.105.20	3.1.013	Employment Contracts	Executed, renewed, or amended on or before August 31, 2015.	AC	4			AC=Expiration or termination of the contract according to its			Tex. Gov't Code 441.1855



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03.106.10	3.1.014	Employment Selection Records - Hired	Includes notes of interviews with candidates; audio and videotapes of job interviews; background check consent forms and previous injury checks; pre-employment physical examinations; polygraph examination results; and all other records that document the selection process. See 3.1.026 for security clearances on hired applicants.	AC	5			AC=Termination of Employment		CAUTION: Does not include criminal history checks. See item number 3.1.026	
03.106.20		Employment Selection Records - Not Hired	Includes notes of interviews with candidates; audio and videotapes of job interviews; background check consent forms and previous injury checks; pre-employment physical examinations; polygraph examination results; and all other records that document the selection process.		5						
03.107.10	3.1.018	Grievance Records	Records relating to the review of employee grievances against personnel policies, working conditions, etc.	AC	5			AC=Termination of Employment		CAUTION: Does not include formal complaints filed by an employee with the Equal Employment Opportunity Commission or other local, state or federal agency. See Item Number 1.1.048. This item also does not include civil rights complaint records, see Agency Item No. 01.100.30.	



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03.108.10	3.1.019	Performance Appraisals		AC	5			AC=Termination of Employment.		See Agency item number 03.108.20 for Faculty performance records.	
03.108.20		Faculty Performance Records (promotion, tenure, post-tenure review)		AC	5			AC=Termination of Employment			
03.109.10	3.1.020	Personnel Corrective Action Documentation	Does not affect pay, status or tenure	AC	5			AC=Termination of Employment		CAUTION: If, during the retention period of this records series, any part of this series is used to document and support personnel disciplinary action under item number 3.1.021, all documentation from this series used to support disciplinary action must be retained for the minimum retention period described by item number 3.1.021.	
03.110.10	3.1.021	Personnel Disciplinary Action Documentation	Affects pay, status or tenure	AC	5			AC=Termination of Employment			29 CFR 1602.49(a).
03.111.10	3.1.022	Personnel Information or Action Form	Forms or similar records used to create or change information concerning the records of an employee including pay grade, position classification, employee number, evaluation date, and termination of employment.	AC	5			AC=Termination of Employment		Form 500	
03.112.10	3.1.023	Position/Job Descriptions	Job descriptions, including all associated task or skill statements, for positions in agency.	AC	5			AC=Termination of Employment			40 TAC 815.106(i).



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03.114.10	3.1.024	Physical Examinations/Medical Reports	Medical or physical examination reports or certificates of employees for whom periodic monitoring of health or fitness is required.	AC	2			AC = Until superseded or termination of employment.		CAUTION: Does not include pre-employment physical examinations. See item number 3.1.014	
03.114.20		Alcohol and Controlled Substance Testing and Prevention programs		AC				AC=In accordance with applicable federal requirements.			
03.115.10	3.1.026	Criminal History Checks	Criminal history record information on job applicants or agency employees.	AC				AC = The criminal history record has served the immediate purpose for which is obtained.		NOTE: See agency item numbers 03.106.10 and 03.106.20 for criminal history background check consent forms. CAUTION: An agency that is authorized to obtain a criminal history record information from DPS must refer to its agency's legislation or see Subchapter F, Chapter 411, Government Code for appropriate retention and use of this information.	
03.116.10	3.1.027	Training and Educational Achievement Records (Individual)	Certificates of completion, transcripts, test scores, or similar records documenting the training, testing, or continuing education achievements of an employee.	AC	5			AC=Termination of Employment			



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03.117.10	3.1.029	Documentation or Verification of Employment Eligibility	Federal reporting form (INS I-9)	AC	1			AC=Termination of Employment		CAUTION: Federal regulation requires that INS I-9 forms be retained for 3 years from date of hire or 1 year after separation of the employee, whichever is later. Agencies should make certain that the INS I-9 forms for employees who terminate from an agency less than 3 years from date of hire are kept for the 3 year retention period.	8 CFR § 274a.2 (b)(2)(i)(A), (c)(2)
03.118.10	3.1.031	Employee Benefits - Other than Insurance	Agency copies of information relating to the selection of available benefit options other than insurance	AC	2			AC = Until superseded or termination of employment.		Caution: Documents that serve as payroll deduction authorizations must be maintained for the retention period prescribed for item number 3.2.001.	
03.119.10	3.1.034	Resumes - Unsolicited	Retention period applies if replies are made to the sender of resume stating that it will be kept on file for future job openings.	AV						See item number 3.1.014 for resumes, whether solicited or unsolicited, that are used in any way in the employment selection process.	



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03.120.10	3.1.035	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. <u>Executed, renewed, or amended on or after September 1, 2015.</u>	AC	7			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. See related item 5.1.001 Contracts and Leases.	Tex. Gov't Code 441.1855.
03.120.20	3.1.035	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. <u>Executed, renewed, or amended on or before August 31, 2015.</u>	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. See related item 5.1.001 Contracts and Leases.	Tex. Gov't Code 441.1855.
03.121.10	3.1.036	Apprenticeship Records	Summary of applicant qualifications, evaluation basis for selection or rejection, original applications, job assignments, promotions, separations, layoffs, terminations, compensation records, conditions of work, time records, hours of training provided (separate from labor), minority status, and gender of all selected and rejected applicants.		5						29 CFR § 30.8(e).
03.122.10	3.1.037	Employee Recognition	Awards, incentives, tenure, etc.	AC	5			AC=Termination of Employment			



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03.123.10	3.1.038	Public Access Option Form	Form completed and signed by employee or official or former employee or official, electing to keep home address, home telephone number, social security number, and family information open or confidential under the Public Information Act, Government code 552.024.	US						See item number 3.3.011	
03.124.10	3.1.039	Ombudsman Records	Consultation records, notes, letters, memos, emails, reports and other documentation	AC				AC = Final decision or matter closed.		Caution: Does not include formal complaint filed with EEO. If matter becomes a grievance or the subject of counseling or litigation, or employee is subject to disciplinary action, the records that are subject to retention are the appropriate records series. SEE 1.1.048, 3.1.018, 3.1.020, and 3.1.021.	
03.200.10	3.2.001	Employee Deduction Authorization	Documentation used to start, modify, or stop all voluntary or required deductions from payroll, including garnishment or other court-ordered attachments.	AC	4			AC=After termination of employee or after amendment, expiration, or termination of authorization, whichever is sooner			
03.201.10	3.2.002	Employee Earning Records		AC	5			AC= End of calendar year of termination of employment.			40 TAC 815.106(i).



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03.202.10	3.2.003	Federal Tax Records	1099, W-2, and other tax records.	AC	4			AC = Tax due date, date claim is filed, or date tax is paid whichever is later.			26 CFR § 31.6001-1(e)(2)
03.203.10	3.2.004	Income Adjustment Authorization	Used to make increases or decreases to employees' gross pay, FICA, retirement, or in the computation of taxes.		2						29 CFR § 516.6(c)
03.204.10	3.2.005	W-4 Forms	Employer's copy of "Employees' Withholding Exemption Certificate."	AC	4			AC = Until superseded, obsolete, or upon separation of employee.			26 CFR § 31.6001-1(e) (2)
03.205.10	3.2.006	Wage Rate Tables			2						29 CFR § 516.6(a)(2)
03.206.10	3.2.007	Unemployment Compensation		AC	5			AC = Settled			
03.207.10	3.2.008	Direct Deposit Applications/Authorization		US							
03.208.10	3.2.009	State Deferred Compensation Records		AC	5			AC=All accounts with a vendor or vendors for the individual participant have been closed		For instruction 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 TX.	
03.209.10	3.2.010	Human Resource Information System (HRIS)	Reports and supporting documentation.	AC	4						
03.300.10	3.3.001	Affirmative Action Plans	For both regular employees and apprenticeship programs		5					For apprenticeship plans.	29 CFR § 30.12(d).



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03.301.10	3.3.004	Benefit Plans	Employee benefit plans such as pension, life, health, and disability insurance; deferred compensation; etc., including amendments.	US	1						29 CFR § 1627.3(b)(2)
03.302.10	3.3.010	Labor Statistics Report	Reports providing statistical information on labor force.		3						
03.303.10	3.3.011	Former Employee Verification Records	Minimum information needed to verify employment includes name, SSN, exact dates of employment, last known address and most recent public access option form.	AC	75			AC=Termination of Employment.		See item number 3.1.038	
03.304.10	3.3.015	Positions/Job Classification Review File	Records relating to review and monitoring of job classifications within an agency.	US	3						
03.305.10	3.3.020	Work Schedules/Assignments	Work, duty, shift, crew, or case schedules, rosters, or assignments.		2						
03.306.10	3.3.022	Texas Workforce Commission (TWC)	Reports from TWC to the agency or its predecessor pertaining to employees.		3						
03.307.10	3.3.023	Reimbursable Activities, Requests and Authorizations in which to Engage	Request and authorizations for travel; participation in educational programs, workshops, or college classes; or for other work-related activities for which the expenses of the employee are defrayed or reimbursed.	FE	3					Includes request for tuition assistance.	
03.307.20		External Employment/Consulting	Includes requests for approval, authorizations, internal disclosures related to such activities.	FE	3						



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03.308.10	3.3.024	Personnel Policies and Procedures	Any internally distributed manuals, guidelines, or similar records that define agency wide policies and procedures concerning the personnel of an agency	US	3						
03.309.20	3.3.025	Job Procedure Records	Any documents detailing the procedural duties and responsibilities of agency positions on a position-by-position basis.	US	3						
03.310.10	3.3.026	Agency Staffing Reports	Any reports compiled by an agency on aspects of personnel staffing, including listings of all staff by program or name, staff hired during a month, detailed listings of employees within its organizational structure, position vacancies, analyses of turnover rates and seasonality of employment, etc.	US	3						
03.311.10	3.3.027	Aptitudes & Skills Tests and Test Papers	Aptitude or skills tests required of job applicants or of current personnel to qualify for promotion or transfer.	US	2					Caution: One copy of each different test (different in terms of either questions or administration procedures) should be retained for the period indicated.	29 CFR 1602.31(a) (State Agencies) 29 CFR 1602.49(a) (State Universities)
03.312.10	3.3.029	Aptitude and Skills Test (Validation Records)		AC	2			AC = As long as the test is used by an agency			29 CFR § 1602.31 (State Agencies) 29 CFR § 1602.49(a) (State Universities)



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03.313.10	3.3.030	Training Administration Records		US	2					Caution: Does not include hazardous material training records. See item number 5.4.007.	
03.314.10	3.3.031	EEO Reports and Supporting Documentation	Includes documentation used to complete EEO reports		3						29 CFR § 1602.32, 48 and 50
03.315.10	3.3.032	Equal Pay Records	Reports, studies, aggregated or summary data and similar documentation compiled to monitor and demonstrate compliance with the federal Equal Pay Act.		3						29 CFR § 1620.32
03.400.10	3.4.001	Accumulated Leave Adjustment Request	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.		4						
03.401.10	3.4.002	Leave Status Report (each pay cycle)	Cumulative report is issued pay cycle and provides employee leave status information for each position.		4						
03.402.10	3.4.003	Less Than Full-Time Worked	Dates and hours.		4						40 Tex. Admin. Code § 815.106(i)
03.403.10	3.4.004	Overtime Authorizations			2						
03.404.10	3.4.005	Overtime Schedules			2						
03.405.10	3.4.006	Time Cards and Time Sheets			4						40 Tex. Admin. Code § 815.106(i)



STATE OF TEXAS Records Retention Schedule

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Retention Codes (field 7)

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

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

Archival Codes (Field 10)

A/I – Transfer to State/University Archivist
R/O – Review by State/University Archivist
E – Exempt from archival review and transfer

This Records Retention Schedule is Amendment 1 of the 8th Recertification & is Approved For Use Beginning 08/30/2021

1. Agency Code: 710			2. Agency Name: Texas A&M System Office								
3. Agency Item No.	4. Record Series Item No.	5. Record Series Title	6. Description	7. Ret. Code	8. Retention Period			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
03.406.10	3.4.007	Time Off and/or Sick Leave Requests			4					Includes supporting documentation for leave requests, such as physician statements.	
03.407.10	3.4.008	Sick Leave Pool Records	Donations and Withdrawals		4						
03.500.10		J-1 Student Intern Evaluations (Applicable to J-1 student interns)		AC	3			AC= completion of student intern program.			22 C.F.R. § 62.23(i)(5)
03.501.10		Labor Condition Applications and Public Inspection Files (H-1Bs and E-3s)		AC	1			AC= earliest of the following termination of employment under labor condition application, date employee has obtained permanent residence, or date labor condition application expired or withdrawn.			20 C.F.R. § 655.760(c)
03.502.10		Payroll Records (H-1Bs and E-3s)			3					Retention period begins on date of record's creation unless an enforcement action is commenced, then records must be kept in accordance with federal regulations.	20 C.F.R. § 655.760(c)
03.503.10		Application for Permanent Employment Certification	Including all supporting documentation	AC	5			AC= date of filing.			20 C.F.R. § 656.10(f)
03.504.10		F-1 Optional Practical Training Records		AC	1			AC= termination of employment.			



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03.505.10		O-1s, TNs, J-1s		AC	3			AC=date status ends.		Not including J-1 Student Intern Evaluations, see agency number 03.500.10.	
03.506.10		I-140 Immigration Petitions		AC	5			AC=date of acquiring permanent residence or termination.			
03.507.10		Application for Appointment as a Visiting Scholar		AC	5			AC= date application rejected or termination of appointment.			
04.100.10	4.1.001	Accounts Payable Information		FE	3						
04.101.10	4.1.002	Billing Detail		FE	3					CAUTION: Does not include long distance telephone billing detail. See item numbers 5.5.001, 5.5.006, and 5.5.007.	
04.102.10	4.1.003	Cancelled Checks/Stubs/Warrants/Drafts		FE	3						
04.103.10	4.1.004	Encumbrance Detail		FE	3						
04.104.10	4.1.005	Inventory and Other Cost Files	Production, job labor quotes, pricing, specifications, etc.	FE	3						
*04.105.10	4.1.006	Investment Transaction Files	Records documenting the investment of any public funds that evidence the investment of such funds, the cancellation or withdrawal of investments, and similar activities.	FE	5					See Agency Item No. 04.501.10 for reports associated with investments.	
04.106.10	4.1.007	Transfers or Budget Revisions	Transfers or adjustment to budgets	FE	3						
04.107.10	4.1.008	Electronic Fund Transfers - Direct Deposit Registers		FE	3						