



**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 US – Until Superseded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  
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**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				
06.600.20		Student Counseling Records - Personal		AC	7			AC=Date of last contact with client; if client is a minor, AC=age of majority			22 Tex. Admin. Code 465.22(d)(2).
06.601.10		Alumni Records		PM							
06.602.10		Library Holdings	Card or automated catalogs, shelf lists, etc.	US						Holdings are not state records, but finding aids are.	
06.603.10		Student Activities and Organizations		US	1						
06.604.10		Intercollegiate Athletics Records		AC				AC=Retain the longer of applicable NCAA, state or TAMUS requirements.			
06.605.10		Instructional Materials		US							
06.606.10		Field Trips and Sponsored Trips		AV							
07.100.10		Forest Resource Development		FE	5						
07.101.10		Research Proposals - Denied	Not Funded.		3						
07.101.20		Research Files	Funded Projects. Proposals, agreements (grants, cooperative agreements, contracts), technical reports, sub-agreements, and related records	AC	7			AC=Completion of the project or longer as required by the agreement, or applicable federal or state law or regulation.		Research data should be retained in accordance with Agency Item # 07.101.30.	Tex. Gov't Code 441.1855.
07.101.30		Research Data		AC				AC=Longest of the following: Completion of the project, as required by the agreement or applicable federal or state law or regulation, or administrative value.		Clinical laboratory records should be retained in accordance with Agency Item # 07.200.30.	



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07.101.40		Animal Management Records	Records relating to the care, management and breeding of animals for research and teaching purposes.	AC	3			AC=Longest of the following: Completion of the activity or applicable federal or state laws or regulations.		See Agency Item # 07.101.50 for Institutional Animal Care and Use Committee Records and Agency Item # 07.101.60 for Institutional Biosafety Committee Records.	9 C.F.R. 2.35
07.101.50		Institutional Animal Care and Use Committee Records	Committee records including reports and meeting documentation.	AC	3			AC=Longest of the following: Completion of the activity or applicable federal or state laws or regulations.		See Agency Item # 07.101.40 for Animal Management Records and Agency Item # 07.101.60 for Institutional Biosafety Committee Records.	9 C.F.R. 2.35
07.101.60		Institutional Biosafety Committee Records	Committee records including reports and meeting documentation.	AC	5			AC=Longest of the following: Completion of the activity or applicable federal or state laws or regulations.		See Agency Item # 07.101.50 for Institutional Animal Care and Use Committee Records and Agency Item # 07.101.70 for Institutional Review Board Committee Records.	
07.101.70		Institutional Review Board Committee Records (Human Subjects Research)	Committee records including reports and meeting documentation.	AC	3			AC=Longest of the following: Completion of the activity or applicable federal or state laws or regulations.		See Agency Item # 07.101.60 for Institutional Biosafety Committee Records.	
07.102.10		Chemical Analysis Reports			5					TAES-Texas State Chemist	



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07.200.10		Patient Records-Dental	This records series consists of the current and complete dental record for every patient seeking care or service from the Baylor College of Dentistry Clinic.	AC	5			AC=Date of patient's last visit		If a patient is younger than 18 years of age when the patient was last treated, disposition may take place on or after the date of the patient's 21st birthday or on or after the 5th anniversary of the date on which the patient was last treated, whichever date is later. 22 Tex. Admin. Code § 108.8(b). NOTE: Shadow files (copies) of patient records must be retained only for the duration necessary to assist the health care professional in tracking and providing care to the patient and should not be held any longer than the original record.	



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07.200.20		Patient Records - Medical	The record may include but is not limited to the following examples: Deficiency Sheet, Data Sheet, Record of Sensitivity, Physician Orders, History and Physical documents; Surgical records; Progress Notes; Consultation Reports; Laboratory and ancillary reports; Xray interpretation records; interpretations of the EEG, EKG and fetal heart monitor tracings; Nurses Notes; Consent Forms and Authorizations; Protocols and Proposals; and Advance Directives, for example, Medical Power of Attorney, Directive to Physicians Out of Hospital.	AC	7			AC=Last Patient Visit		After the 7th anniversary of the date on which the patient who is the subject of the record was last treated; if a patient is younger than 18 years of age when the patient was last treated, disposition may take place on or after the date of the patient's 21st birthday or on or after the 7th anniversary of the date on which the patient was last treated, whichever date is later. NOTE: Shadow files (copies) of patient records must be retained only for the duration necessary to assist the health care professional in tracking and providing care to the patient and should not be held any longer than the original record. See agency item no. -7.200.10, Patient Records - Dental.	22. Tex. Admin. Code § 165.1(b).



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07.200.30		Clinical Laboratory Records		AV						No records will be destroyed in the time shorter than required by regulation. The College of American Pathologists recommends that most laboratory records be retained for 5 to 10 years at the minimum with records retained for a longer period of time when such would be appropriate for patient care, education or quality improvement needs. This record series includes, donor and recipient records, gross photographs, reports, etc., for surgical pathology, cytology, nonforensic autopsy records, forensic autopsy records, clinical pathology records, cytogenetics records, blood bank, general laboratory and other diagnostic tests. SEE the Laboratory Accreditation Newsletter published in March 2001, available electronically at <a href="http://www.cap.org">http://www.cap.org</a> , for specific recommendations on retention of various materials and records.	



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07.200.40		Requests for Blood Component and Lab Tests	This series documents physician orders for laboratory tests in order to obtain blood components. It may include but is not limited to: name of patient; date; physician's signature; test(s) ordered and results; transfusion reactions, anti-body workups, and cord blood testing.	AC	7			AC=Last Patient Visit		Usually filed as part of the patient record. SEE patient records #07.200.10 and 07.200.20. After the 7th anniversary of the date on which the patient who is the subject of the record was last treated; if a patient is younger than 18 years of age when the patient was last treated, disposition may take place on or after the date of the patient's 21st birthday or on or after the 7th anniversary of the date on which the patient was last treated, whichever date is later. 22. Tex. Admin. Code § Section 165.1. NOTE: Shadow files (copies) of patient records must be retained only for the duration necessary to assist the health care professional in tracking and providing care to the patient and should not be held any longer than the original record.	



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07.200.50		Pharmacy Prescription Dispensation Records	This series is used to provide an individual, daily summary, and annual summary record of initial drug dispensation and refills administered by the department as required by the Texas State Pharmacy Board. This series may include but is not limited to: prescription slips; in-house computer-generated Rx registers; controlled substance reports; and data base purge reports.		3					SEE ALSO 5.4.009 - Workplace Chemical Lists - which includes Controlled Substance Drug Logs	Tex. Health & Safety Code Sec. 481.067(c).
07.200.70		Donor Records - Medical	This records series consists of completed bequeathal forms and cadaver information for people who have donated their bodies or organs or other body parts to the agency.	PM							
07.200.80		Payment Waivers / Adjustments	Patient billing accounts that have been written off. Records may include but are not limited to payment waivers for prescriptions and copays; teaching case waivers, insurance explanation of benefits (EOB).		1					Dental School and clinics use these records as paper backup to electronic billing records systems.	
07.300.10		4-H Program Records		AV							
07.301.10		Camps/Programs for Minors Records		AC				AC=Administrative value or longer as required by applicable state law or System policy.			