



THE TEXAS A&M UNIVERSITY SYSTEM
RECORDS RETENTION SCHEDULE

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period	Archival	Remarks
ADMINISTRATION RECORDS					
Section I.1 - General					
1.1.002	01.100.10	Audits – Audits and reviews performed by or on behalf of an agency, including the working papers that support the audit. Also includes audits performed on the agency audits	AC+7		AC=Publication or release of final audit findings. The State Auditor’s Office retains any copies of its audits performed on Texas state agencies.
1.1.004	01.101.10	Legislative Appropriations Requests – Including any supporting documentation created and/or used to justify and support legislative appropriations requests by an agency.	AC+6	I	AC = September 1 of odd-numbered calendar years. Records with archival value will be retained in the agency archives.
1.1.006	01.102.10	Complaint File – Complaints received by an agency from the public concerning the agency and records pertaining to the resolution of the complaint.	AC+2		AC=Final disposition of the complaint CAUTION: if a complaint becomes the subject of litigation, it must be included in and is subject to the minimum retention period of item number 1.1.048.

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I.I.007	01.103.10	Correspondence - Administrative – Incoming/outgoing and internal correspondence, in any format, pertaining to the formulation, planning, implementation, interpretation, modification, or redefinition of the programs, services, or projects of an agency and the administration of policies, procedures and programs that govern them.	3	○	Should be considered for retention in archives. CAUTION: This records series and item number I.I.008 should be used only for correspondence that is not included in or directly related to another records series on the agency’s approved schedule. For example, a memorandum that documents an appropriations request must be retained for the minimum retention period prescribed by item number I.I.004; a letter concerning an audit for that prescribed by item number I.I.002, etc. SEE ALSO item number I.I.010
I.I.008	01.104.10	Correspondence - General – Non-administrative incoming/outgoing and internal correspondence, in any media, pertaining to or arising from the routine operations of the policies, programs, services, or projects of an agency. (includes interoffice correspondence; excludes directories)	1		SEE comments to item number I.I.007. SEE ALSO item number I.I.010
I.I.010	01.105.10	Directives (routine issuances on general office procedures)	US+1		

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1.1.011	01.106.10	Executive Orders – Any document that initiates, rescinds, or amends a regulation, policy, or procedure that governs the programs, services, or projects of an agency.	US+3	I	
1.1.013	01.107.10	Calendars, Appointments and Itinerary Records – Desk calendars, appointment books, and similar records, purchased with state funds that documents appointments, itineraries, and other activities of an agency official or employee.	CE+I	O	CAUTION: A record of this type purchased with personal funds, but used by a state official or employee to document his or her work activities may be a state record and subject to the retention period.
1.1.014	01.108.10	Legal Opinions and Advice – from agency legal counsel or the Attorney General including request eliciting the opinions	AV	O	CAUTION: Does not include legal opinions or advice rendered on a matter in litigation or with regard to pending litigation. SEE item number 1.1.048
1.1.019	01.109.10	Public Relations Records – News or press releases issued by the agency. Includes print, electronic, audio, and audiovisual	2	O	
1.1.020	01.110.10	Public Information Requests, Requested information disclosed – Includes all correspondence and documentation relating to requests for records that are furnished to the public under Public Information Act (Chapter 552, Government Code).	AC+2		AC=Date Request Fulfilled NOTE: If a portion of the records are withheld from disclosure, item no. 1.1.021 applies instead of this records series.

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1.1.021	01.111.10	Public Information Requests, Requested information withheld – Includes all correspondence and documentation relating to requests for records that are excepted from disclosure or confidential under Public Information Act (Chapter 552, Government Code).	AC+2		AC = The latest of the following dates, as applicable; the date of the institution or agency’s receipt of the office of the attorney general’s decision that records are excepted from disclosure or confidential, or if an attorney general decision is not required, the date the records are determined to be excepted from disclosure or confidential, or the date the institution or agency provides to the requestor the portion of the records that are not excepted from disclosure of confidential.
1.1.023	01.112.10	Organization Charts	US	I	
1.1.024	01.113.10	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	O	AC=Decision made to implement or not to implement result of planning process
1.1.026	01.114.10	Texas Register Submissions – Copies of all proposed, withdrawn, emergency, and adopted rules; open meeting notices; or any other documents required by law to be submitted to the Texas Register.	AC+1		AC=Date of publication in the Texas Register
1.1.027	01.115.10	Proposed Legislation – Drafts of proposed legislation and related correspondence.	AV		

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1.1.038	01.116.10	Customer Surveys – Surveys returned by the customers or clients of an agency, and the statistical data maintained rating an agency’s performance.	AC		AC = Final disposition of summary report
1.1.040	01.117.10	Speeches, Papers and Presentations - Notes or text of papers, presentations, or reports delivered in conjunction with agency work.	AC	○	AC = End of term in office or service in a state position.
1.1.041	01.118.10	Suggestion System – Suggestions submitted by agency personnel and responses.	I		
1.1.043	01.119.10	Training Manuals – Instructional materials developed by an agency for training entities or individuals it regulates or serves.	US+I		

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I.I.048	01.120.10	Litigation Files – Records created by or on behalf of an agency in anticipation of or in the adjudication of a lawsuit.	AC+I	○	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. Cases that set legal precedent or exhibit historical value will be evaluated by the Archives and Information Services Division of the Texas State Library and Archives Commission for archival preservation.
	01.120.20	Liability Waivers	AC+I	○	AC = Expiration of the applicable statute of limitations. For example, the limitations period for a personal injury suit is generally two years from the date of the injury or death.
I.I.053	01.121.10	Registration Logs – Logs or similar records used to register persons appearing before state agencies as required by Chapter 2004, Government Code, including quarterly reports filed with the Texas Ethics Commission.	AC		AC = Report filed with the Texas Ethics Commission.

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1.1.055	01.122.10	Strategic Plans - Includes information resources and operational strategic plans prepared in accordance with Tex. Govt. Code, §§ 2054.095 and 2056.002.	AC+6	I	AC = September 1 of odd-numbered calendar years Agency retains the permanent Record Copy and sends required copies to the Publications Depository Program, Texas State Library
1.1.056	01.123.10	ADA (American with Disabilities Act Documentation - Self evaluations and plans documenting compliance with Americans With Disabilities Act.	3		28 Code of Federal Regulations (CFR) § 35.105 (c)
1.1.057	01.124.10	Transitory Information (Records of temporary usefulness that are not an integral part of a records series of an agency, that are not regularly filed within an agency's recordkeeping system, and that are required only for a limited period of time for the completion of an action by an official or employee of the agency or in the preparation of an on-going records series.) Transitory records are not essential to the fulfillment of statutory obligations or to the documentation of agency functions. Some examples of transitory information, which can be in any medium (voice mail, fax, email, hard copy, etc.) are routine messages; internal meeting notices; routing slips; incoming letters; telephone messages; or memoranda of transmittal that add nothing of substance to enclosures; and similar routine information used for communication, but not for the documentation, of a specific agency transaction.	AC		AC=Purpose of record has been fulfilled. CAUTION: Records management officers should use caution in assigning this records series item number to records of an agency to make certain they are not part of another records series listed in this schedule or, for records series unique to an agency, are not part of a records series that documents the fulfillment of the statutory obligations of the agency or the documentation of its functions. The disposal of transitory information need not be documented through destruction sign-offs (1.2.001) or in records disposition logs (1.2.010), but agencies should establish procedures governing disposal of these records as part of its records management plan (1.2.014).

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I.I.058	01.125.10	Meeting Agenda and Minutes – Official agenda and minutes of state boards, committees, commissions, and councils that conduct open meetings as required by Government Code Chapter 551.	PM	I	Agency retains permanent copy. CAUTION: This records series and item numbers I.I.059, I.I.060, I.I.061, and I.I.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.
I.I.059	01.126.10	Meetings, Certified Agendas or Tape Recordings of Closed – Certified agendas or tape recordings of closed meetings of state boards, commissions, committees, and councils	AC+2		AC = The data of the meeting or completion of pending action involving the meeting, whichever is later.
I.I.060	01.127.10	Meetings, Audio and Videotapes of Open Audio or videotapes of open meetings of state boards, commissions, committees, etc.	AC+90 days		AC = Official Approval of written minutes of the meeting by governing body of an agency CAUTION: Minutes of state agencies are permanent records. Audio and videotapes are not permanent media. State agencies may not retain audio or videotapes of the meetings of governing bodies in lieu of written minutes. The proceedings of all meetings of state boards, committees, commissions, and councils must be reduced to writing. See caution comment at item number I.I.058.

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I.1.061	01.128.10	Meeting Notes – Notes taken during open meetings of state boards, commissions, committees, and councils from which written minutes are prepared.	AC + 90 days		AC = Approval of the formal minutes by the governing body.
I.1.062	01.129.10	Meetings Supporting Documentation – Documents submitted at meetings of state boards, commissions, committees, and councils including exhibit items, documentation for agenda items, etc. Includes documents sent in advance of meetings for briefing purposes, some of which may not be submitted at an actual meeting.	2	I	
I.1.063	01.130.10	Staff Meeting Minutes/Notes – Minutes or notes, and supporting documentation taken at internal agency staff meetings	1		
I.1.064	01.131.10	Agency Performance Measure Documentation – Any records of an agency needed for the documentation of output, outcome, efficiency, and explanatory measures in an agency’s appropriations request or strategic plan, and for performance measures used to manage the agency.	FE+3		CAUTION: The FE+3 retention period overrides any shorter retention period for a records series in this schedule if the records series is needed for documentation of agency performance measures.
I.1.065	01.132.10	Reports and Studies (Non-Fiscal) - Raw Data – Information or data collected and compiled for the purpose of producing non-fiscal reports.	AV		

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1.1.066	01.133.10	Reports, Annual and Biennial Agency (Narrative) – Biennial narrative reports to the governor and legislature as required by an agency’s enabling statutes, including annual narrative reports if they are required by statute.	AC+6	I	AC=September 1 st of odd-numbered calendar years Agency retains the Record Copy and sends required copies to the Publications Depository Program
1.1.067	01.134.10	Reports and Studies (Non-fiscal) – Annual, sub-annual, or special reports or studies on non-fiscal aspects of an agency’s programs, services, or projects compiled by agency personnel, by advisory committees, or by consultants under contract with an agency that are not noted elsewhere in this schedule. Includes reports distributed either internally or to other entities	3	O	
1.1.068	01.135.10	Reports on Performance Measures - Quarterly and annual reports on agency performance measures submitted to executive and legislative offices	AC+6		AC=September 1 st of odd-numbered calendar years
1.1.069	01.136.10	Activity Reports - Reports compiled by agency personnel on a daily or other periodic basis pertaining to workload monitoring, task completion times, number of public contacts, and similar activities.	1		

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I.1.070	01.137.10	Agency Rules, Policies, and Procedures – Final – Manuals, guidelines, administrative rules, or similar records distributed internally for the use of employees or externally to the public or those individuals or entities regulated by an agency that sets out the rules, policies, and procedures that govern an agency’s programs, services, or projects.	AC+3	○	AC = Completion or termination of programs, rules, policies or procedures. SEE ALSO: Agency Rules, Policies and Procedures – Working Files, item number I.1.071
I.1.071	01.138.10	Agency Rules, Policies, and Procedures – Working Files – Manuals, guidelines, administrative rules, or similar records distributed internally for the use of employees or externally to the public or those individuals or entities regulated by an agency that sets out the rules, policies, and procedures that govern an agency’s programs, services, or projects.	AC+3	○	AC = Completion or termination of programs, rules, policies or procedures. See also item number I.1.070
I.1.072	01.139.10	Public Information Reports – Reports made to Texas Building and Procurement Commission on an agency’s Public Information Act activities.	2		
I.1.073	01.140.10	Administrative Hearings – Transcripts and final decisions of hearings conducted as part of the regulatory process, and hearings on proposed rules and changes. The records may be maintained with related information including meeting notices, proofs of publication, and meeting minutes.	AC+3	○	AC = Last action.

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I.1.074	01.141.10	Sunset Review Report and Documentation	AC+3	○	AC = After the subsequent Sunset Review
I.1.075	01.142.10	Alternative Dispute Resolutions – Final Agreement – Final agreement described by Government Code §2009.054(c), associated with a matter conducted under an alternative dispute resolution procedure in which personnel of a state agency participated as a party on the agency’s behalf.	AC+4		AC = Date of final agreement. Tex. Civ. Prac. and Rem. Code, § 154.071
	01.143.10	Patents and Related Documents	AC+20		AC = Date patent is issued.
	01.144.10	Organizational Memberships	AV		
	01.145.10	Gift and Donor Records	PM		

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Section 1.2 – Records Management					
1.2.001	01.200.10	Destruction Authorizations – Agency level documents authorizing final disposition of records under a certified records retention schedule	FE+3		
1.2.003	01.201.10	Forms History File – Print masters of original version and all subsequent revisions to an agency form, including any associated design or design modification requests.	AC+1		AC=Discontinue use of forms
1.2.004	01.202.10	Forms Inventory – Any periodic listing of all forms used internally or externally by an agency	US		
1.2.005	01.203.10	Records Retention Schedule (Agency copy) – Includes documentation of certification and approval – forms SLR 105C and/or other forms designated by the State Records Administrator.	US		Original is retained permanently by SLRMD of Texas State Library. Record copy retained by Records Management Officer
1.2.006	01.204.10	Records Transmittal Forms (Agency Copy) – Forms indicate records transferred to storage or a transfer of legal custody.	AC+2		AC=Date of authorization for destruction, permanent transfer from storage, or transfer to the Archives and Information Services Division, Texas State Library and Archives Commission, by the agency records administrator.
1.2.008	01.205.10	Request for Authority to Dispose of State Records.	FE+3		Original is retained by the Records Retention Officer
1.2.010	01.206.10	Records Disposition Logs	10		

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1.2.012	01.207.10	Records Inventory Worksheets	US		
1.2.013	01.208.10	Records Control Locator Aids – Includes indexes, card files, shelf lists, registers, guides, etc.	AC		AC = When control aid is updated, revised, or no longer needed.
1.2.014	01.209.10	Records Management Plan	US+I		
1.2.015	01.210.10	Disaster Recovery Service Transmittals (RMD 109) – Also includes documentation for disaster recovery services provided by other entities	FE+I		See Also 5.4.013
1.2.016	01.211.10	Disaster Recovery Service Approval Form (RMD 113) – Agency Copy of Form	AC		AC=Until superseded or termination of service.

Section 1.3 – Publications

1.3.001	01.300.10	State Publications - One copy of each state publication except a publication that is subject to a different retention period in this schedule.	AC+2	○	<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 those publications meant to be distributed in a</p>
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					<p>first published version without subsequent revision, the date decision is made within an agency to no longer make the publication available for distribution.</p> <p>For serial publications issued in successive parts bearing numerical or chronological designations (e.g., newsletters, annual statistical reports of regulated activities), from the date of release of the next part in the series.</p>
1.3.002	01.301.10	Publication Files – Background material, copy (drafts), original artwork, photo negatives, prints, flats, etc. This includes all work performed both inside and outside the agency.	AV	○	
Section 1.4 – Academic Administration Records					
	01.400.10	Accreditation Files	PM		
	01.401.10	Completed Class Tests and Examinations, Students’ Course Papers	AC+I		AC=Academic term
	01.402.10	Course Syllabus/Outlines Files	AV		CAUTION: If record copy of syllabus is posted electronically on institution website in accordance with Texas Education Code § 51.974, retain at least 2 years.
	01.403.10	Curriculum Files, Including Revisions, Central Administrative	US+5		Review before disposal as some may merit permanent retention for historical reasons.

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Record Series Title

Retention Period

Archival

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	01.404.10	Curriculum Files, including Revisions, Departmental	US+5		
	01.405.10	Instructor/Faculty Evaluations	AC+1	AC=Academic term	
	01.406.10	Instructor Grade Books	AC+1	AC=Academic term	
	01.407.10	Instructor Grade Sheets	AC+1	AC=Academic term	
	01.409.10	New Course Proposals File, Central Administrative	AV		
	01.410.10	New Course Proposals File, Departmental	AV		
		For Class Lists, see Section 6.2 For Grade Books, see Section 6.2 For Class Schedule (institutional), see Section 6.4			

**ELECTRONIC DATA
PROCESSING RECORDS**

Section 2.1 – Automated Applications

2.1.001	02.100.10	Processing Files - Machine-readable files used in the creation, utilization, and updating of master files,	AC	AC = Completion of 3rd verification cycle, or audit completion confirming successful transaction processing, or required audit trail maintenance, or the ability to restore or migrate when errors are detected or when hardware or software changes occur. Caution: Be certain before assigning the retention period of AC to automated processing files that the files do not fall under records series listed elsewhere.
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