



STATE OF TEXAS
Records Retention Schedule

SLR 105
Form SLR 105C must accompany this form.

2. Agency Code: 743		3. Agency Name: The University of Texas at San Antonio						
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			

ADMINISTRATION RECORDS

Section 1.1 - General

1.1.002	1.1.102	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+14		AC+14		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	1.1.104	Biennial Budget 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 University Archivist. Only copies of supporting documentation submitted to the Legislative Budget Board are archival.		
1.1.006	1.1.106	Complaint File - From employees and others concerning the institution 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.		
1.1.007	1.1.107	Correspondence - Administrative – Incoming/outgoing and internal correspondence/email pertaining to the formulation, planning, implementation, interpretation, modification, or redefinition of the programs, services, or project of an institution and the administrative regulations, policies, and procedures that govern them.	3		3	O	ARCHIVES NOTE: Only the administrative correspondence of executive staff, board or commission members, division directors and program heads require archival review. Contact the University Archivist when these records have met their retention periods.		

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Valuable CE – Calendar Year End FE – Fiscal Year End LA – Life of Asset MO – Months PM – Permanent US – Until Superseded	I – Transfer to UTSA Archives O – Review by UTSA Archivist



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1.1.008	1.1.108	Correspondence - General (Non-administrative) incoming/outgoing and internal correspondence/email, in any media, pertaining to or arising from the routine operations of the policies, programs, services, or projects of an institution.	1		1		SEE comment to item number 1.1.007. SEE ALSO item number 1.1.010.		
1.1.010	1.1.110	Directives (routine issuances on general office procedures)	US+1		US+1	O			
1.1.011	1.1.111	Executive Orders – Any document that initiates, rescinds, or amends a regulation, policy, or procedure that governs the programs, services, or projects of an institution.	US+3		US+3	I			
1.1.013	1.1.113	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 University Archivist when these records have met their retention periods.		
1.1.014	1.1.114	Legal Opinions and Advice – From agency legal counsel or the Attorney General, including any requests eliciting the opinions	AV		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	1.1.119	Public Relations Records – News, press releases, or any public relations files maintained or issued by an agency. Includes print, electronic, audio, and audiovisual records.	2		2	O			

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1.1.020	1.1.120	Public Information Requests – 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+2		AC+2	AC=Date Request Fulfilled		
1.1.021	1.1.121	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 exempted.		
1.1.023	1.1.123	Organization Charts	US		US	I		
1.1.024	1.1.124	Planning Records – Plans and records relating to the process of planning new or redefined programs, services or projects of an institution that are not included in or directly related to other records series in this schedule.	AC+3		AC+3	O AC=Decision made to implement or not to implement result of planning process. ARCHIVES NOTE: Data processing planning records are not archival.		
1.1.024	1.1.224	Data Processing Planning Records - Reports, Studies & Analyses	AC+3		AC+3	AC=Decision made to implement or not to implement results of planning process		
1.1.024	1.1.324	Long- and Short-Range Data Processing Plans	AC+3		AC+3	O AC=Decision made to implement or not to implement results of planning process		
1.1.026	1.1.126	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+1	AC=Date of publication in the Texas Register		
1.1.027	1.1.127	Proposed Legislation – Drafts of proposed legislation and related correspondence.	AC+2		AC+2	AC = End of Legislative Session		

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1.1.038	1.1.138	Reports, Studies, and Surveys - Final (non-routine or special) Surveys returned by the customer or clients of an agency, and the statistical data maintained rating an agency's performance.	AC+3		AC+3		AC = Final disposition of summary report. SEE item number 1.1.067 for summary reports compiled from customer surveys.		
1.1.040	1.1.140	Speeches, Papers and Presentations – Notes or text of speeches, papers or presentations 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	1.1.141	Suggestion System – Suggestions submitted by institution personnel and responses.	1		1				
1.1.043	1.1.143	Training Manuals – Instructional materials developed by an institution for training entities or individuals it regulates or serves.	US+1		US+1	O			
1.1.048	1.1.148	Litigation Files – Records created by or on behalf of an institution in anticipation of or in the adjudication of a lawsuit. (Also includes files/records related to formal complaints filed with the Equal Employment Opportunity Commission (EEOC) of the U.S. Department of Labor.)	AC+10		AC+10	I	All statutes of limitations must have been met before file is closed. AC=As applicable, decision of an institution 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. ARCHIVES NOTE: Cases that set legal precedent or exhibit historical value will be evaluated by the University Archivist for archival preservation.		

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1.1.055	1.1.155	Strategic Plans - Includes information resources and operational strategic plans prepared in accordance with Tex. Govt. Code, §§ 2054.095 and 2056.002.	AC+6		AC+6	I AC=September 1 st of odd-numbered calendar years. UTSA retains the permanent Record Copy and sends required copies to the University Archivist.		
1.1.056	1.1.156	ADA (Americans with Disabilities Act) Documentation - Self evaluations and plans documenting compliance with Americans With Disabilities Act.	3		3	28 Code of Federal Regulations (CFR) 35.105(c)		
1.1.058	1.1.158	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 NOTES: Agency retains permanent record copy. The archival requirement will be met by sending a copy to the University Archivist. CAUTION: This records series and item number 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.		
1.1.059	1.1.159	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 last. Government Code, 551.104(a). SEE caution comment at item number 1.1.058.		

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1.1.060	1.1.160	Meetings, Audio or Videotapes of Open - Audio or videotapes of open meetings of state boards, commissions, committees, etc.	AC+ 90 days	AC+ 90 days	O	AC = Official Approval of written minutes of the meeting. CAUTION: Minutes of state agencies are permanent records. Audio and videotapes are not permanent media. State agencies may not retain audio or videotape 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.		
1.1.061	1.1.161	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	1.1.162	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.		
1.1.063	1.1.163	Staff Meeting Minutes and Notes – Minutes or notes, and supporting documentation, taken at internal staff meetings.	1	1				

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1.1.064	1.1.164	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.		
1.1.065	1.1.165	Reports, Studies, and Surveys - Raw Data – Information or data collected and compiled for the purpose of producing non-fiscal reports.	AV		AV	CAUTION: Does not include source documentation used for information or data included in or directly related to another records series in this schedule. SEE especially item number 1.1.064.		
1.1.066	1.1.166	Reports – Annual and Biennial Agency - Record Copy – Biennial and Annual narrative reports to the governor and legislature as required.	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 University Archivist.		

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1.1.067	1.1.167	Reports – Administrative or By Consultants or Committees (not including fiscal records), 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 Energy Management Reports and other reports distributed either internally or to other entities.	3		3	O			
1.1.068	1.1.168	Reports on Performance Measures - Reports on institution performance measures submitted to the executive and legislative offices.	AC+10		AC+10	O	AC=September 1 st of odd-numbered calendar years. UTSA retains the permanent Record Copy.		
1.1.069	1.1.169	Reports – Employee (activity and production type reports)	1		1		CAUTION: See item number 1.1.064.		
1.1.070	1.1.170	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+10		AC+10	O	AC=Completion or termination of program, rules, policies or procedures. SEE ALSO: Item number 1.1.071		

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1.1.071	1.1.171	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+10		AC+10	O	AC=Completion or termination of program, rules, policies or procedures. SEE ALSO: Item number 1.1.070		
1.1.073	1.1.173	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+3	O	AC=Last Action		
	1.1.174	Artifact Loan Condition Forms	PM		PM				
	1.1.175	Artifact Owner Records	PM		PM				
	1.1.176	Consulting Approval Request	FE+3		FE+3				
	1.1.177	Deeds and Other Legal Documents Reflecting Legal Title - Property deeds, appraisals, surveys, description of property and all other supporting documents.	LA		LA		Note: documents of ownership of vehicles are retained per 5.6.007.		
	1.1.178	Legal Correspondence	AC+1		AC+1	O	AC = After matter closed / completed. Note: If correspondence relates to a matter in litigation, see 1.1.048.		
	1.1.179	Organizational Memberships	US+3		US+3				

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	1.1.180	Patents, Trademarks and Related Documents - Any documents relating to a patent or trademark.	AC+20		AC+20	O		
	1.1.181	Copyrights and Related Documents – Any documents relating to a copyright (whether officially registered with the US Patent and Trademark Office or not).	PM		PM	I		
	1.1.182	Preliminary Summary Report - Possible claim under Texas Tort Claims Act	AC+2		AC+2		AC = After incident closed or claim settled. Note: If matter leads to litigation see 1.1.048.	
	1.1.183	Project Logbooks	AC+3		AC+3		AC = Terminated	
	1.1.184	Subpoenas - Legal documents requiring recipient to appear in court to testify, or to produce records to be used in litigation.	AC+1		AC+1	I	AC = After closed/completed	

ADMINISTRATION RECORDS
Section 1.2 - Records Management

1.2.001	1.2.101	Destruction Authorizations (listing records destroyed) Agency level documents authorizing final disposition of records under a certified records retention schedule.	FE+3		FE+3			
1.2.003	1.2.103	Forms History File – Print masters of original version and all subsequent revisions to an institution form, including any associated design or design modification requests.	AC+1		AC+1		AC=Discontinuance of use of form.	
1.2.004	1.2.104	Forms Inventory - Any periodic listing of all forms used internally or externally by an agency.	US		US			

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1.2.005	1.2.105	Records Retention Schedule - UTSA copy of SLR 105. Includes documentation of certification and approval – forms SLR 105C, and/or other forms designated by the State Records Administrator.	US		US	Original is retained by Texas State Library and Archives Commission.		
1.2.006	1.2.106	Records Transmittal Forms - UTSA Copy – 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 University Archivist.		
1.2.008	1.2.108	Request for Authority to Dispose of State Records (RMD 102) - UTSA Copy	FE+3		FE+3	Original is retained by SLRMD of Texas State Library and Archives Commission.		
1.2.010	1.2.110	Records Disposition Logs - Logs or similar records listing records destroyed or transferred to the University Archivist, showing records series title, dates of records, and date destroyed or transferred.	10		10			
1.2.011	1.2.111	Record Center Storage Approval Forms - UTSA copy.	US		US			
1.2.012	1.2.112	Records Inventory Worksheets	US		US			
1.2.013	1.2.113	Records Control Locator Aids - Includes indexes, card files, shelf lists, registers, guides, etc.	US		US			
1.2.014	1.2.114	Records Management Plan 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			

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Section 1.3 - Publications

1.3.001	1.3.101	Institution Publications - Record Copy (Not University Catalogs) One copy of each institution publication except a publication that is subject to a different retention period in this schedule.	AC+2		AC+2	I	AC=Until superseded or obsolete. 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. SEE 6.4.108 for University Catalogs.		
1.3.002	1.3.102	Publication Development Files – Background material, copy (drafts), original artwork, photo negatives, prints, flats, etc. This includes all work performed both inside and outside the institution.	AV		AV	O			

ADMINISTRATION RECORDS
Section 1.4 - Academic Administration
Records

	1.4.100	Accreditation Files	PM		PM	I	May be transferred to the University Archivist after 10 years but must be maintained permanently.		
	1.4.101	Completed Class Tests and Examinations, Students' Course Papers	AC+1		AC+1		AC=Academic term		

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	1.4.102	Course Syllabus/Outlines Files	AV		AV			
	1.4.103	Curriculum Files, Including Revisions, Central Administrative	US+5		US+5	O	Review before disposal as some may merit permanent retention for historical reasons.	
	1.4.104	Curriculum Files, including Revisions, Departmental	US+5		US+5	O	Review before disposal as some may merit permanent retention for historical reasons.	
	1.4.105	Instructor Grade Books	AC+5		AC+5		AC=Academic term	
	1.4.106	Instructor Grade Sheets - Grade sheets submitted by instructors, advanced credit posting authorizations, and grade rolls or similar input documentation used in posting grades or credit data to transcripts	AC+5		AC+5		AC=Academic term	
	1.4.107	Instructor/Faculty Evaluations	AC+2		AC+2		AC=Academic term 29 CFR 1620.32(c)	
	1.4.108	Leave Forms and Travel Files, Faculty	FE+3		FE+3			
	1.4.109	New Course Proposals File, Central Administrative	AC+5		AC+5	O	AC=Academic term Note: Review before disposal as some may merit permanent retention for historical reasons.	
	1.4.110	New Course Proposals File, Departmental	AC+5		AC+5	O	AC=Academic term Note: Review before disposal as some may merit permanent retention for historical reasons.	

ELECTRONIC DATA PROCESSING RECORDS

Section 2.1 - Automated Applications

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			Agency	Storage	Total			

2.1.001	2.1.101	Automated Files - Processing Files - Machine-readable files used in the creation, utilization, and updating of master files, including printing, raw data input, maintenance and test, working, and transactional files.	AC		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 deducted or when hardware or software changes occur.		
2.1.002	2.1.102	Automated Files - 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 processing, or required audit trail maintenance, or the ability to restore or migrate when errors are deducted or when hardware or software changes occur.		
2.1.007	2.1.107	Software Programs and Job Control Language - Automated software applications and operating system files including job control language, program listing/source code, etc.	AC+20		AC+20	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. 13 TAC 6.94. CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.		

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 UTSA Archives			
AV – As Long As Administratively Valuable	FE – Fiscal Year End	MO – Months	US – Until Superseded	O – Review by UTSA Archivist			



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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
2.1.008	2.1.108	Hardware Documentation - Automated Applications 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=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. 13 TAC 6.94. CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.			

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 UTSA Archives			
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2. Agency Code: 743	3. Agency Name: The University of Texas at San Antonio
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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			

2.1.009	2.1.109	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.	AC		AC	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. CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.		
2.1.010	2.1.110	Audit Trail Records Files needed for electronic data audits such as those 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		

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			
2.1.011	2.1.111	Finding Aids, Indexes and Tracking Systems Automated indexes, lists, registers and other finding aids used to provide access to the hard copy and electronic records.	AC		AC		AC=The related hard copy or electronic records have been destroyed. CAUTION: These records must carry the same retention period and archival code of the records they support.	

ELECTRONIC DATA PROCESSING RECORDS
Section 2.2 - Computer Operations

2.2.001	2.2.101	System Monitoring Records – Electronic files or automated logs created to monitor computer systems such as print spool logs, tape activity logs, etc.	AV		AV			
2.2.002	2.2.102	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+5		FE+5			
2.2.004	2.2.104	Computer Job Schedules and Reports – Schedules or similar records showing computer jobs to be run and other reports by computer operators or programmers of work performed.	3 mos.		3 mos.		Note: These may be kept longer if they possess additional administrative value.	

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			

2.2.010	2.2.110	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 number 2.1.009.		
2.2.011	2.2.111	Batch/Data Entry Control Forms/Log – Forms and logs used to reconcile batches submitted for processing against batches received and processed.	AC		AC	AC=When reconciliation confirmed.		
2.2.012	2.2.112	Output Records for Computer Production (Mini and Mainframe) – Reports showing transactions that were accepted, rejected, suspended, and/or processed.	AV		AV	Output may be either in printed or magnetic form. If magnetic, the files, programs and documentation must be available.		
2.2.013	2.2.113	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		

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			

2.2.014	2.2.114	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).		
2.2.015	2.2.115	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).		
2.2.016	2.2.116	Software Registrations, Warranties and License Agreements	LA+3		LA+3			

EMPLOYMENT RECORDS
Section 3.1 - Employee Records

3.1.001	3.1.101	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	29 CFR 1602.31 (State Agencies); 29 CFR 1602.49(a) (State Universities)		
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Retention Codes (Field 7)	Archival Codes (Field 8)
AC – After Closed, Terminated, Completed, Expired, Settled AV – As Long As Administratively Valuable	I – Transfer to UTSA Archives O – Review by UTSA Archivist
CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months
PM – Permanent	US – Until Superseded



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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			

3.1.002	3.1.102	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		
3.1.006	3.1.106	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+3	AC=Termination of Counseling		
3.1.011	3.1.111	Employee Insurance Records – Copies of information relating to the selection by employees of life, disability, health, and other types of insurance.	AC+50		AC+50	AC=Until superseded or termination of employment. CAUTION: Documents that serve as payroll deduction authorization must be maintained for the retention period prescribed for item number 3.2.001.		
3.1.012	3.1.112	Employment Opportunity Announcements – Internal or external announcements or advertisements of job openings, promotions, training programs, or opportunities for overtime.	2		2	29 CFR 1602.31 (State Agencies) 29 CFR 1602.49(a) (State Universities)		
3.1.013	3.1.113	Employment Contracts	AC+5		AC+5	AC=Termination of Employment		

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			

3.1.014	3.1.114	Employment Selection Records - Includes notes of interviews with candidates, questions asked of applicants, audio and videotapes of job interviews, driving records, and previous injury checks, pre-employment physical examinations, pre-employment drug testing, polygraph examination results; and all other records that document the selection process.	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.		
3.1.018	3.1.118	Grievance Records – Records relating to the review of employee grievances against personnel policies, working conditions, etc.	AC+5		AC+5	AC=Final decision on the grievance. CAUTION: Does not include formal complaints filed by an employee with the Equal Employment Opportunity Commission (EEOC) of the U.S. Department of Labor. See Item Number 1.1.048.		
3.1.019	3.1.119	Performance Appraisals	2		2	29 CFR 1620.32(c)		
3.1.020	3.1.120	Personnel Corrective Action Documentation 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.	AC+5		AC+5	AC=Termination of Corrective Action. CAUTION: If, during the retention period of this record 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.		
3.1.021	3.1.121	Personnel Disciplinary Action Documentation Disciplinary actions are those actions which may affect pay, status, or tenure.	AC+5		AC+5	AC=Termination of Employment		

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

3.1.022	3.1.122	Personnel Information or Action Form (Form 500) 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)		
3.1.023	3.1.123	Position/Job Descriptions (for individuals; classified and nonclassified positions) – Job descriptions, including all associated task or skill statements.	AC+5		AC+5	AC=Until superseded or job eliminated. 40 TAC 815.106(i)		
3.1.024	3.1.124	Physical Examinations/Medical Reports - Medical or physical examination reports or certificates of employees for whom periodic monitoring of health or fitness is required. (not to include pre-employment physicals)	AC+2		AC+2	AC=Until superseded or termination of employment. CAUTION: Does not include pre-employment physical examinations. SEE item 3.1.014.		
3.1.026	3.1.126	Criminal Background Checks (CBCs) - 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 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.		

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			

3.1.027	3.1.127	Training and Educational Achievement Records – Certificates of completion, transcripts, test scores, or similar records documenting the training, testing, or continuing education achievements of an employee.	AC+5		AC+5	AC=Termination of Employment		
3.1.029	3.1.129	Documentation or Verification of Employment Eligibility - Federal reporting form (INS I-9)	AC+1		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. See 8 CFR 274a.2.		
3.1.031	3.1.131	Employee Benefits - Other than Insurance - Agency copies of information relating to the selection of available benefit options other than insurance.	AC+2		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.		
3.1.034	3.1.134	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		AV	SEE item number 3.1.014 for resumes, whether solicited or unsolicited, that are used in any way in the employment selection process.		

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.
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3.1.035	3.1.135	Surety Bonds - Bonds posted by employees and individuals or entities under contract with an institution for the performance of the duties of a position or the terms of a contract with the institution.	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	3.1.136	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		5	29 CFR 30.8(e)		
3.1.037	3.1.137	Employee Recognition Records (awards, incentives, tenure, etc.)	AC + 5		AC + 5	AC=Termination of Employment		
3.1.038	3.1.138	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		

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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			

3.1.039	3.1.139	Ombudsman Records - Consultation records, notes, letters, memos, emails, reports and other documentation.	AC		AC	AC=Final decision or matter closed. CAUTION: Does not include formal complaint filed with the EEOC. If matter becomes a grievance or the subject of counseling or litigation, or employee is subject to disciplinary action, the records are subject to retention in the appropriate records series. SEE 1.1.048, 3.1.006, 3.1.018, 3.1.020, and 3.1.021.		
	3.1.140	Certificates of Age (minor workers)	AC+5		AC+5	AC=Worker Reaches Majority		
	3.1.141	Employee Career Planning Records	AV		AV			
	3.1.142	Selective Service Verification Log	PM		PM			

EMPLOYMENT RECORDS
Section 3.2 - Payroll

3.2.001	3.2.101	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+4	AC=After termination of employee or after amendment, expiration, or termination of authorization, whichever is sooner.		
3.2.002	3.2.102	Employee Earnings Records	4		4	40 TAC 815.106(i)		
3.2.003	3.2.103	Federal Tax Records - Includes 1099, W2, FICA, and other tax records.	AC+5		AC+5	AC=Tax due date, date claim is filed, or date tax is paid whichever is later. 26 CFR 31.6001-1(e)(2) (Retention is based from return, paid or claim date)		

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			

3.2.004	3.2.104	Income Adjustment Authorization – 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)		
3.2.005	3.2.105	W-4 Forms – Employer’s copy of “Employee’s Withholding Exemption Certificate.”	AC+5		AC+5	AC=Until superseded, obsolete, or upon separation of employee 26 CFR 31.6001-1(e)(2)		
3.2.006	3.2.106	Wage Rate Tables	2		2	29 CFR 516.6(a)(2)		
3.2.007	3.2.107	Unemployment Compensation Records	AC+5		AC+5	AC=Settled		
3.2.008	3.2.108	Direct Deposit Applications/Authorization	US		US			
3.2.009	3.2.109	State Deferred Compensation Records	AC+5		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 Texas.		
3.2.010	3.2.110	Human Resources Information System (HRIS) Report - Includes supporting documentation.	AC+4		AC+4			

EMPLOYMENT RECORDS
Section 3.3 - Personnel Administration

3.3.001	3.3.101	Affirmative Action Plans – for both regular employees and apprenticeship programs	5		5	29 CFR 30.8(e) for apprenticeship plans.		
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Retention Codes (Field 7)	Archival Codes (Field 8)
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3.3.004	3.3.104	Benefit Plans - Employee benefit plans such as pension, life, health and disability insurance, deferred compensation, etc. including amendments.	US+3		US+3	29 CFR 1627.3(b)(2)		
3.3.010	3.3.110	Labor Statistics Reports	3		3			
3.3.011	3.3.111	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 (3.1.038).	AC+75		AC+75	AC=Termination of Employment		
3.3.015	3.3.115	Positions/Job Classification Review File	US+3		US+3			
3.3.020	3.3.120	Work Schedules/Assignments	2		2			
3.3.022	3.3.122	Texas Workforce Commission (TWC) Reports (from TWC to agency)	3		3			
3.3.023	3.3.123	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 employee are defrayed or reimbursed.	FE+3		FE+3			
3.3.024	3.3.124	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			

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



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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			

3.3.025	3.3.125	Job Procedure Records - Any documents detailing the procedural duties and responsibilities of agency positions on a position-by-position basis.	US+3		US+3			
3.3.026	3.3.126	Agency Staffing Reports - Any report 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, analysis of turnover rates and seasonality of employment, etc.	US+3		US+3			
3.3.027	3.3.127	Aptitudes & 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	3.3.128	Aptitude and Skills Tests (Test Papers) - Aptitude or skills test papers 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)		
3.3.029	3.3.129	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)		

Retention Codes (Field 7) AC – After Closed, Terminated, Completed, Expired, Settled AV – As Long As Administratively Valuable 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 UTSA Archives O – Review by UTSA Archivist
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3.3.030	3.3.130	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.		
3.3.031	3.3.131	EEO Reports and Supporting Documentation - Includes documentation used to complete EEO reports.	3		3	29 CFR 1602.32, .39, .41, .48 and .50		
3.3.032	3.3.132	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		
	3.3.133	Address Change Form	US		US			
	3.3.135	Individual Personnel File - Current Employee	AC		AC	Must maintain for duration of employment. AC=date employee either separates (3.3.137) or retires (3.3.136) from employment, file to be retained accordingly.		
	3.3.136	Individual Personnel File - Retired Employees	AC+50		AC+50	AC=Retirement of Employee		
	3.3.137	Individual Personnel File - Separated Employee	AC+5		AC+5	AC=Separation/Termination of Employee		

EMPLOYMENT RECORDS
Section 3.4 - Time and Leave Records

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

3.4.001	3.4.101	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			
3.4.002	3.4.102	Leave Status Report (each pay cycle) – Cumulative report is issued pay cycle and provides employee leave status information for each position.	FE+3		FE+3			
3.4.003	3.4.103	Less Than Full-Time Worked Reports (dates and hours)	4		4	40 TAC 815.106(i).		
3.4.004	3.4.104	Overtime Authorizations	3		3			
3.4.005	3.4.105	Overtime Schedules	2		2			
3.4.006	3.4.106	Time Cards and Time Sheets	4		4	40 TAC 815.106(i).		
3.4.007	3.4.107	Time Off and/or Sick Leave Requests	FE+3		FE+3			
3.4.008	3.4.108	Sick Leave Pool Records - Donations and Withdrawals	FE+3		FE+3			

FISCAL RECORDS

Section 4.1 - Worksheets, Detail Information on Economic Event or Transaction

4.1.001	4.1.101	Accounts Payable Information	FE+3		FE+3	Subject to federal audit		
4.1.002	4.1.102	Billing Detail	FE+3		FE+3	Subject to federal audit. CAUTION: Does not include long distance telephone billing detail. SEE item numbers 5.5.001, 5.5.006, and 5.5.007.		

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

4.1.003	4.1.103	Cancelled Checks/Stubs/Warrants/Drafts	FE+3		FE+3	Subject to federal audit		
4.1.004	4.1.104	Encumbrance Detail	FE+3		FE+3	Subject to federal audit		
4.1.005	4.1.105	Inventory and Other Cost Files - Production, job, labor, quotes, pricing, specifications, etc.	FE+3		FE+3			
4.1.006	4.1.106	Investment Transaction Files	FE+3		FE+3			
4.1.007	4.1.107	Transfer or Budget Revisions	FE+3		FE+3			
4.1.008	4.1.108	Electronic Fund Transfers - Direct Deposit Registers	FE+3		FE+3			

FISCAL RECORDS

Section 4.2 - Documents of Original Entry

4.2.001	4.2.101	Cash Deposit Vouchers - Includes deposit slips	FE+3		FE+3			
4.2.002	4.2.102	Cash Receipts – Includes receipts for fees (permits, licenses, renewals, etc.).	FE+3		FE+3			
4.2.003	4.2.103	Daily Cash Receipts Log	FE+3		FE+3			
4.2.004	4.2.104	Encumbrance Vouchers – Orders, statements, change orders, etc.	FE+3		FE+3			
4.2.005	4.2.105	Purchase Vouchers – Requisitions, orders, receiving reports, invoices, or statements, change orders, best value determinations, etc.	FE+3		FE+3	Subject to federal audit		
4.2.006	4.2.106	General Journal Vouchers	FE+3		FE+3			
4.2.007	4.2.107	Expenditure Vouchers - Includes travel expense reports, payroll, etc. (Request for Travel Authorizations and Travel Reimbursement Forms are maintained under 3.3.023.)	FE+3		FE+3	Subject to federal audit		
	4.2.108	City Armored Service Receipt Books	FE+3		FE+3			

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	4.2.109	Student Bills (Unpaid) - With Promissory Notes	AC+5		AC+5	AC=Date Paid		

FISCAL RECORDS
Section 4.3 - Journals or Registers

4.3.001	4.3.101	Sales	FE+3		FE+3			
4.3.002	4.3.102	Receipts	FE+3		FE+3			
4.3.003	4.3.103	Expenditures	FE+3		FE+3			

FISCAL RECORDS
Section 4.4 - Ledgers

4.4.001	4.4.101	General and Subsidiary Ledgers	FE+3		FE+3			
4.4.002	4.4.102	Accounts Receivable Ledgers	FE+3		FE+3			
4.4.003	4.4.103	Accounts Payable Ledgers	FE+3		FE+3			
4.4.004	4.4.104	Employee Savings Bond Ledgers	FE+3		FE+3			

FISCAL RECORDS
Section 4.5 - Reports

4.5.001	4.5.101	Worksheets for Preparing Fiscal Reports	FE+3		FE+3			
4.5.002	4.5.102	Internal Fiscal Management Reports – Includes monthly budget reports.	FE+3		FE+3			

<p>Retention Codes (Field 7)</p> <p>AC – After Closed, Terminated, Completed, Expired, Settled AV – As Long As Administratively Valuable</p> <p>CE – Calendar Year End FE – Fiscal Year End</p>	<p>Archival Codes (Field 8)</p> <p>I – Transfer to UTSA Archives O – Review by UTSA Archivist</p> <p>LA – Life of Asset MO – Months</p> <p>PM – Permanent US – Until Superseded</p>
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4.5.003	4.5.103	Annual Financial Report - Required by General Appropriations Act (100 Day Report).	PM		PM	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.		
4.5.005	4.5.105	External Fiscal Reports - Special purpose – Federal financial reports, salary reports, etc. Includes HUB Reports.	FE+3		FE+3			
4.5.006	4.5.106	Annual Operating Budgets - Required by the General Appropriations Act.	FE+6		FE+6			
4.5.007	4.5.107	USAS Reports - Daily	AC		AC	AC=Receipt and reconciliation of monthly report		
4.5.008	4.5.108	USAS Reports - Monthly	AC		AC	AC=Receipt and reconciliation of annual report		
4.5.009	4.5.109	USAS Reports - Annual	FE+3		FE+3			

FISCAL RECORDS

Section 4.6 - Documents Showing Compliance with System of Internal Control

4.6.001	4.6.101	Monthly Balancing	FE+3		FE+3			
4.6.002	4.6.102	Reconciliations	FE+3		FE+3			
4.6.003	4.6.103	Cash Counts	FE+3		FE+3			
	4.6.104	Inventory Sheets	FE+3		FE+3			

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			Agency	Storage	Total					

FISCAL RECORDS
Section 4.7 - Other Fiscal Records

4.7.001	4.7.101	Accounting Policies and Procedures Manual	US+3		US+3		
4.7.002	4.7.102	Bank Statements	FE+3		FE+3		
4.7.003	4.7.103	Returned Checks/Warrants/Drafts (Uncollectible)	AC+3		AC+3	AC=After deemed uncollectible	
4.7.004	4.7.104	Capital Asset Records	LA+3		LA+3	O Property records should include any payment-related source documentation (i.e. invoices, payment vouchers, receipts, etc.) necessary to substantiate the value of the asset.	
4.7.005	4.7.105	Claim Files	AC+3		AC+3	AC=Resolution of claim.	
4.7.006	4.7.106	Comptroller Statements	FE+3		FE+3		
4.7.007	4.7.107	Detail Chart of Accounts – One for all accounts in use for a fiscal year.	FE+3		FE+3	One for all accounts in use for a year.	
4.7.008	4.7.108	Federal Grant Records	AC+5		AC+5	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.	
4.7.008	4.7.208	Sponsored Grants and Contracts	AC+3		AC+3	AC=Term of Grant	
4.7.009	4.7.109	Fixed Asset Sequential Number Log	US+3		US+3		
4.7.010	4.7.110	Long-Term Liability Records - Bonds, etc.	AC+3		AC+3	AC=Retirement of debt	

Retention Codes (Field 7)	Archival Codes (Field 8)
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4.7.011	4.7.111	Texas Facilities Commission (TFC) Statements – (formerly Texas Building and Procurement Commission (TBPC)) Charge or bill statements received by institutions from the TFC for services provided.	FE+3		FE+3			
4.7.012	4.7.112	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			
	4.7.113	Credit Memos	AC+5		AC+5	AC=Settled		
	4.7.114	Gift and Donor Records - Documents potential or realized private, corporate, or public agency funding to the institution, including endowments, gifts, donor records and trusts. May include but is not limited to: award guidelines, letters and agreements of gifts, donation amounts, names of donors and any other related documentation and correspondence.	PM		PM	I CAUTION: Security is open with restrictions.		

SUPPORT SERVICES RECORDS
Section 5.1 - General

<p><i>Retention Codes (Field 7)</i></p> <p>AC – After Closed, Terminated, Completed, Expired, Settled AV – As Long As Administratively Valuable</p> <p>CE – Calendar Year End FE – Fiscal Year End</p>	<p><i>Archival Codes (Field 8)</i></p> <p>I – Transfer to UTSA Archives O – Review by UTSA Archivist</p>
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			Agency	Storage	Total	9. Remarks	106 No.	

5.1.001	5.1.101	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. Includes research contracts and documents of original entry - federal contracts.	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.		
5.1.003	5.1.103	Delivery Reports -(includes Federal Express)	2		2			
5.1.004	5.1.104	Mailing Lists – Any mailing address, telephone or fax number, or e-mail address records maintained by an institution on its employees or on entities or persons it serves (i.e. Students).	US		US			
5.1.005	5.1.105	Postage Meter Records and Postage Expense Reports (includes airborne)	FE+3		FE+3			
5.1.007	5.1.107	Requisitions for Copy/Printing Service	AV		AV			
5.1.010	5.1.110	Licenses & 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.		
5.1.011	5.1.111	Photocopier & Telefax Usage Logs & Reports (leased equipment)	AV		AV			
5.1.012	5.1.112	Charge Schedules/Price Lists - Schedules of prices charged by an institution for services to the public or other agencies, including any documentation used to determine the charges.	US+3		US+3			
5.1.012	5.1.212	Price Lists (agency and vendor lists)	US+3		US+3			

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			Agency	Storage	Total	9. Remarks	106 No.	

5.1.013	5.1.113	Insurance Policies – For vehicles, equipment, etc.	AC+20		AC+20		AC = Expiration or termination of the policy according to its terms.		
5.1.014	5.1.114	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				
5.1.015	5.1.115	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				
5.1.017	5.1.117	Contract Log - List of agency contracts, leases and agreements including general obligation, land leases, utilities and construction contracts.	FE+3		FE+3				
	5.1.118	Campus Post Office Records	4		4				

SUPPORT SERVICES RECORDS

Section 5.2 - Facility Management

5.2.001	5.2.101	Appraisals - Building or Property	AV		AV	O	Disclosure of Information would be “closed” until a contract is awarded and “open” after awarding of a contract		
5.2.002	5.2.102	Building Construction Project Files – Planning, design, and construction records; accepted and rejected bids; correspondence; etc. Applies to new construction and renovations	AC+11		AC+11	O	AC=Completion of project. See 5.2.003 and 5.2.028.		

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5.2.003	5.2.103	Building Plans & Specifications - State-Owned - Includes architectural and engineering drawings, profiles and blueprints.	LA		LA	O	See 5.2.002 and 5.2.028.		
5.2.003	5.2.203	Building Plans & Specifications – Leased - Includes architectural and engineering drawings, profiles and blueprints.	AC+11		AC+11		AC=Termination or cancellation of lease. See also item numbers 5.2.002 and 5.2.028.		
5.2.004	5.2.104	Building Space Requests	1		1				
5.2.005	5.2.105	Calibration (Equipment or Instrument)	10		10				
5.2.006	5.2.106	Certificate of Destruction of Property	FE+3		FE+3				
5.2.007	5.2.107	Damage Reports	FE+3		FE+3				
5.2.008	5.2.108	Equipment History File; Equipment Service Agreements – Agreements or contracts with an equipment vendor to provide maintenance service for equipment. Includes requests for installation, moves, service, etc.; and service/repairs logbooks, etc. (includes computer hardware maintenance records)	LA+3		LA+3				
5.2.009	5.2.109	Equipment Inventory Detail Report Form – Updates institution portion of the inventory listing and adds, changes, transfers, or deletes items from inventory.	FE+3		FE+3				
5.2.010	5.2.110	Equipment Manuals	LA		LA				
5.2.011	5.2.111	Equipment Warranties	AC+1		AC+1		AC=Expiration of Warranty.		
5.2.012	5.2.112	Estimate Files (Supply & Repair Cost Estimates)	1		1				
5.2.014	5.2.114	Inventory – Annual Physical	FE+3		FE+3				

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5.2.015	5.2.115	Notice of Equipment Removed From Inventory	FE+3		FE+3			
5.2.016	5.2.116	Inventory System Update Listing – 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	5.2.117	Lost and Stolen Property Report	FE+3		FE+3			
5.2.018	5.2.118	Quality Control Reports	2		2			
5.2.019	5.2.119	Service Orders – Institution copy of forms completed by mechanical service personnel for installation or repair. Includes billing code, service, labor, parts, and remarks.	1		1			
5.2.020	5.2.120	Supply Usage Records	FE+1		FE+1			
5.2.021	5.2.121	Surplus Property Sale Reports	FE+3		FE+3			
5.2.022	5.2.122	Utility Reports	AV		AV			
5.2.023	5.2.123	Year-to-Date Activity (Inventory Listing) – Shows additions, changes, transfers, and deletions of information within the inventory system. Data include institution, division, tag number, batch, document, transaction date, location, item code, description, date, and cost.	FE+3		FE+3			
5.2.024	5.2.124	Material Specifications	AC+2		AC+2	AC = Material is no longer in the agency.		
5.2.025	5.2.125	Equipment Descriptions and Specifications (set by agency)	AC+2		AC+2	AC = Equipment is no longer in the agency.		
5.2.026	5.2.126	Facilities Reservation Logs	2		2			
5.2.027	5.2.127	Space Utilization Reports	AV		AV			

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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.
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5.2.028	5.2.128	Building Construction Contract & Inspection Records - Building construction contracts, surety bonds, and inspection records. (Applies to new construction and renovations)	LA+10		LA+10	O	See also item numbers 5.2.002 and 5.2.003		
	5.2.131	Facilities Inventory	LA+2		LA+2	O			
	5.2.132	Real Property Inventory	LA+2		LA+2	O			

SUPPORT SERVICES RECORDS
Section 5.3 - Purchasing

5.3.002	5.3.102	Freight Bills Paid	FE+3		FE+3				
5.3.003	5.3.103	Freight Claims	AC+2		AC+2		AC=Resolution of claim.		
5.3.004	5.3.104	Orders – Acknowledgments	4		4				
5.3.005	5.3.105	Packing Slips	1		1				
5.3.007	5.3.107	Bid Documentation - Includes bid requisition/authorizations, invitations to bid or propose, bid specifications, accepted and rejected bids, and bid tabulation/evaluations.	FE+3		FE+3		FE=the fiscal year end of the year that the period of delivery or service expires. 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.		

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



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5.3.007	5.3.207	RFP/RFQ Documentation - Includes Request for proposal and request for qualifications, bid specifications, accepted or rejected bids or proposals, bid tabulations/evaluations, reference sheets and final matrix.	FE+3		FE+3	FE=the fiscal year end of the year that the period of delivery or service expires. 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.		
5.3.008	5.3.108	Purchasing Logs – log, register, etc., providing a record of purchase orders issued, orders received, and similar data on procurement status.	FE+3		FE+3			
5.3.008	5.3.208	ProCard Log - And supporting documentation	FE+5		FE+5			
5.3.009	5.3.109	Requests for Information – Requests for information preliminary to the procurement of goods or services by direct purchase or bid.	AC		AC	AC=Date of direct purchase, issuance of request for bids, or decision not to proceed with the procurement, as applicable		

SUPPORT SERVICES RECORDS

Section 5.4 - Safety

5.4.001	5.4.101	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 Worker’s Compensation Commission of 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.		
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Retention Codes (Field 7)				Archival Codes (Field 8)			
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5.4.002	5.4.102	Evacuation Plans	US		US			
5.4.003	5.4.103	Inspection Records – Fire, safety, and other inspection records of 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.	
5.4.004	5.4.104	Fire Orders - Issued by Fire Marshal to correct fire code deficiencies.	AC+3		AC+3		AC=Deficiency corrected	
5.4.007	5.4.107	Hazardous Materials Training Records	5		5		Texas Health and Safety Code, §502.009(g)	
5.4.008	5.4.108	Hazard Communication Plans	US+5		US+5		Texas Health and Safety Code, §502.009(g)	
5.4.009	5.4.109	Workplace Chemical Lists	30		30		Texas Health and Safety Code, §502.009(d)	
5.4.010	5.4.110	Material Safety Data Sheets	AC		AC		AC = After sheets are updated or hazardous chemical no longer stored by agency, as applicable.	
5.4.011	5.4.111	Visitor Control Registers - Logs, registers, or similar records documenting visitors to limited access or restricted areas of facilities.	3		3			
5.4.012	5.4.112	Security Access Records - Records relating to the issuance of keys, identification cards, building passes, passwords, signed statements or similar instruments of access to agency facilities, equipment or automated systems.	AC+2		AC+2		AC=Until superseded, date of expiration, or date of termination, whichever is sooner.	
5.4.013	5.4.113	Disaster Preparedness and Recovery Plans	US		US			

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	5.4.114	Asbestos and Mold Abatement Records - Surveys, monitoring tests and reports, building plans, correction checklists, abatement records, and related documentation and correspondence.	PM		PM			
	5.4.115	Insurance Claims (Excluding Claims for Injuries to Student-Athletes)	AC+5		AC+5	AC=After closed/completed.		
	5.4.116	Insurance Policies - Casualty	PM		PM			
	5.4.117	Insurance Policies - Property	AC+20		AC+20	AC=After closed/completed.		
	5.4.118	Safety Training - Includes non-hazardous communications as well as all other safety training documents	US+1		US+1			

SUPPORT SERVICES RECORDS

Section 5.5 - Telecommunications

5.5.001	5.5.101	Billing Detail - Telecommunication (does not include TEX-AN) – In addition to summary detail, includes any accompanying detailed listing of long distance calls.	FE+3		FE+3	SEE item number 5.5.006 for TEX-AN billing detail.		
5.5.002	5.5.102	Long Distance Telephone Log (includes Wire Transfers) – Long distance logs created by departments for internal documentation purposes. Includes any similar logs created for long distance facsimile or electronic transmissions.	AV		AV			
5.5.003	5.5.103	Station Activity Reports – Internal listing of incoming/ outgoing telephone activity to individual telephone stations.	AV		AV			

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

5.5.004	5.5.104	System Activity Reports – Internal listing of all incoming/outgoing institution telephone activity.	AV		AV			
5.5.006	5.5.106	Billing Detail - Telecommunications (TEX-AN) Applies only to TEX-AN billing detail received by an agency from the GSC BEFORE June 1, 1994. Includes any accompanying detailed listing of long distance calls.	FE+3		FE+3	The billing agency will maintain all long distance TEX-AN records and will provide each using agency its bill summary of centralized capitol complex telephone service without call detail records. For these bill summaries, SEE item number 4.7.011. SEE item number 5.5.001 for billing detail from carriers other than TEX-AN.		
5.5.007	5.5.107	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			
	5.5.108	Telephone Charges - Dorm Resident	FE+3		FE+3			

SUPPORT SERVICES RECORDS

Section 5.6 - Vehicles

5.6.003	5.6.103	Inspection Repair & Maintenance Records	LA+1		LA+1			
5.6.004	5.6.104	License and Driving Record Check	AC		AC	AC=Until superseded or until termination of employment.		
5.6.005	5.6.105	Vehicle Use Reports - Includes mileage, fuel/oil consumption, passengers carried and other related operational information.	FE+3		FE+3			
5.6.007	5.6.107	Vehicle Titles and Registrations	LA		LA			
5.6.009	5.6.109	Parking Permits or Assignments	US		US			

Retention Codes (Field 7)	Archival Codes (Field 8)
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SUPPORT SERVICES RECORDS

Section 5.7 - Campus Security, Traffic and Parking

	5.7.100	Accident Reports - File records relating to traffic accidents, including accident reports, supplemental accident reports, photographs, correspondence and related documentation.	3		3		Note: If an arrest is made or a citation issued as the result of an accident, the accident report shall be considered an offense investigation record and must be retained per 5.7.119.1 or 5.7.119.2.		
	5.7.101	After Action Reports	3		3				
	5.7.102	Appeals - Citations	1		1				
	5.7.103	Arrest Reports - Arrest report and fingerprints on each person arrested by UTSA PD and charged with a felony or a misdemeanor not punishable by fine only.	AC+75		AC+75		AC=Date of arrest or date of death of arrestee.		
	5.7.104	Building Security Reports/File	3		3	O			
	5.7.105	Campus Security Reports	3		3	O			
	5.7.106	Citations (Paid)	FE+3		FE+3				
	5.7.107	Citations (Unpaid)	3		3		Transfer to Paid File (5.7.106) upon payment.		
	5.7.108	Court Appearance Citations	3		3				
	5.7.109	Crime Statistics Data and Report (P.L. 101-542) – including Campus Safety and Security Report	3		3	O			
	5.7.111	Found Property Tags	PM		PM		Hard Copy destroyed after document is stored electronically.		
	5.7.112	Juvenile Reports	AC		AC		AC=Statute of Limitations		
	5.7.113	Parking Permit Refunds	FE+3		FE+3				
	5.7.114	Parking Violation Reports	5		5				

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	5.7.115	Police Call Sheets	2		2			
	5.7.116	Police Crime Blotters	7		7			
	5.7.117	Police Dispatcher Logs	PM		PM	Hard Copy destroyed after document is stored electronically.		
	5.7.118	Police Incident Reports	3		3			
	5.7.119	Police Offense Reports - Offense and supplemental offense reports; investigation reports and notes; witness statements; latent fingerprints; results of chemical analysis and polygraph tests; crime scene, mug shot, and other photographs; laboratory reports; arrest reports (Class C misdemeanors only); citations, affidavits; criminal process; victim impact statements; and other records relating and customary to the investigation of criminal offenses or other violations of state law or local ordinance.	AC		AC	AC=Statute of Limitations. Maintain for review by police or federal agencies during background investigations or by prosecutors if subject involved in subsequent offenses. Note: If offense/accident results in arrest and DWI/DUI or second/third degree felony charges, see 5.7.119.1. If offense/accident results in citation and/or misdemeanor or state jail felony, see 5.7.119.2.		
	5.7.119.1	Offense/Accident Reports (resulting in arrest and DWI/DUI or second degree or higher felony charges).	AC+10		AC+10	AC=Date of arrest or date of death of arrestee.		
	5.7.119.2	Offense/Accident Reports (resulting in citation and/or misdemeanor or state jail felony).	AC+3		AC+3	AC=Date of arrest/citation or date of death of arrestee.		
	5.7.120	Student Safety Records (traffic appeals, etc.)	AC+5		AC+5	AC=Settled		
	5.7.121	Temporary Vehicle Registration	1		1			
	5.7.122	Tow Records	3		3			
	5.7.123	Vehicle Registration Files (non-UTSA owned vehicles)	2		2			

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STUDENT RECORDS

Section 6.1 - Admissions Data/Documents

	6.1.100	Documents for Applicants Who Do Not Enter - Includes acceptance letters, advanced placement records, applications for admission, correspondence, entrance examination reports, letters of recommendation, medical records, placement scores, readmission forms, test scores.	AC+1		AC+1	AC=Application term		
	6.1.101	Documents for Applicants Who Enter/Enroll - Includes acceptance letters, advanced placement records, applications for admission & readmission, correspondence, entrance examination reports, medical records, placement scores, residency classification forms, test scores.	AC+5		AC+5	AC=End of application term. Hard Copy is destroyed after microfilming		
	6.1.102	Letters of Recommendation	AC		AC	AC=After enrollment. Waivers of rights of access filed with letters of recommendation should be retained as long as the file is retained.		
	6.1.103	Recruitment Materials	3		3			
	6.1.105	Scholarship Applications - Not Awarded - Records of students who have applied for departmental scholarships and who have not received funds.	AC+1		AC+1	AC= End of academic period for which aid was denied		

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	6.1.106	Scholarship Applications - Recipients - Records of students who have applied for departmental scholarships and received funds.	AC+3		AC+3	AC=End of award period.		
	6.1.107	Renewable Scholarship Recipient Applications and associated paperwork	AC+3		AC+3	AC = End of award period.		
	6.1.108	Transcripts (applicants who do not enter)	AC+1		AC+1	AC=Application term. If document would be hard to replace, may return to applicant.		
	6.1.109	Transcripts (applicants who enter)	AC+5		AC+5	AC=Application term. Hard Copy is destroyed after microfilming		

STUDENT RECORDS
Section 6.2 - Registration and Records
Data/Documents

	6.2.100	Academic Action Authorizations (dismissal, etc.)	AC+5		AC+5	AC=Graduation or date of last attendance		
	6.2.101	Academic Transcripts from UTSA	PM		PM	Hard Copy destroyed after document is stored electronically.		
	6.2.102	Advanced Placement Records	PM		PM	Hard Copy destroyed after document is stored electronically.		
	6.2.103	Affidavit for I-485 - Aliens who are residents of Texas	PM		PM			
	6.2.104	Applications for Admission or Readmission (Accepted)	PM		PM	Hard Copy destroyed after document is stored electronically.		
	6.2.105	Application for Graduation	AC+5		AC+5	AC=Graduation or date of last attendance		
	6.2.106	Audit Authorizations	AC+1		AC+1	AC=One year after date submitted		
	6.2.107	Certification for Concurrent Enrollment Form	PM		PM	Hard Copy destroyed after document is stored electronically.		

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6.2.108	Challenge Exam Forms	PM		PM			
6.2.109	Change of Classification Form	PM		PM		Hard Copy destroyed after document is stored electronically.	
6.2.110	Change of Grade Forms (update documents)	PM		PM		Hard Copy destroyed after document is microfilmed.	
6.2.111	Change of Information - Students personal information; address, phone number, name, etc.	AC+5		AC+5		AC=Graduation or date of last attendance	
6.2.112	Changes of Course (add/drop)	AC+5		AC+5		AC=Date submitted. Official copy is microfilmed	
6.2.113	Class Lists (grade sheets)	PM		PM		Hard Copy destroyed after document is stored electronically.	
6.2.114	Class Schedules (students)	PM		PM		Hard Copy destroyed after document is stored electronically.	
6.2.115	Correspondence, Relevant to Students' Registration and Data Documents	AC+5		AC+5		AC=Graduation or date of last attendance	
6.2.116	Correspondence/Extension Class Records	PM		PM		Hard Copy destroyed after document is stored electronically.	
6.2.117	Course Audit Form	PM		PM			
6.2.118	Course Inventory Data File	US		US		Hard Copy destroyed after document is stored electronically.	
6.2.119	Credit by Examination Forms (entered) - CLEP, AP, etc.	PM		PM		Hard Copy destroyed after document is stored electronically.	
6.2.120	Credit by Examination Forms (did not enter) - CLEP, AP, etc.	AC+1		AC+1		AC=End of semester submitted	
6.2.121	Credit/No Credit Approvals	AC+1		AC+1		AC=End of academic term.	
6.2.122	Curriculum Change Authorizations	AC+5		AC+5		AC=Graduation or date of last attendance	

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	6.2.123	Degree Audit Records	PM		PM	Hard Copy destroyed after document is stored electronically.		
	6.2.124	Degree Audit Request Forms	AC+6 mos.		AC+6 mos.	AC = until termination of enrollment		
	6.2.125	Degree Statistics - Major Changes	PM		PM	Hard Copy destroyed after document is stored electronically.		
	6.2.126	Disciplinary Record - Disciplinary documentation relating to suspension, expulsion, denial or revocation of a degree and/or withdrawal of diploma. Record includes nature of charge, disposition, sanction assessed and any other pertinent information.	PM		PM	NOTE: If does not result in suspension, expulsion, denial or revocation of degree or withdrawal of diploma, SEE 6.2.163.		
	6.2.127	Duplicate Diploma Requests	AC+1		AC+1	AC = One year after diploma is ordered.		
	6.2.128	Enrollment Certifications - Undergraduates enrolling in graduate courses	PM		PM			
	6.2.129	Fee Assessment Forms	AC+5		AC+5	AC=Graduation or date of last attendance		
	6.2.130	Financial Aid Audit Documents	AC+5		AC+5	AC= After annual audit has been accepted by Department of Education		
	6.2.131	Foreign Credentials Evaluation - (applicants who do not enter)	AC+3		AC+3	AC=End of Semester Submitted		
	6.2.132	Foreign Credentials Evaluation - (applicants who enter)	PM		PM	Hard Copy destroyed after document is stored electronically.		
	6.2.133	Foreign Student Forms (I-20, etc.)	AC+5		AC+5	AC=Graduation or date of last attendance		
	6.2.134	Grade Reports (Registrar's copies)	PM		PM	Hard Copy destroyed after document is stored electronically.		
	6.2.135	Graduation Authorizations	AC+5		AC+5	AC=Graduation or date of last attendance		

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			Agency	Storage	Total				9. Remarks

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	6.2.136	Graduation Lists	PM		PM	I	Hard Copy destroyed after document is stored electronically.		
	6.2.137	Guidelines for the CR/NC Grade Option - Undergraduate students only.	PM		PM		Hard Copy destroyed after document is stored electronically.		
	6.2.138	Hold or Encumbrance Authorizations	AC		AC		AC=Until released.		
	6.2.139	Incomplete Grade Contracts	AC+1		AC+1		AC=Contract Fulfilled/Terminated		
	6.2.140	Independent Study Course Form	PM		PM		Hard Copy destroyed after document is stored electronically.		
	6.2.141	Itemized Public Info. Changes for Educational Records Requests Form	PM		PM				
	6.2.142	Student Medical Records (including Student Health Services, Counseling Services, and Disability Services records)	AC+10		AC+10		AC=Date of last visit		
	6.2.144	Miscellaneous Memos and Emails - (applicants who do not enter) - To students, departments, etc.	AC+3		AC+3		AC=End of semester submitted		
	6.2.145	Miscellaneous Memos and Emails - (applicants who enter) - To students, departments, etc.	PM		PM				
	6.2.146	Miscellaneous Waiver, Substitution and Petition Letters and Forms	PM		PM				
	6.2.147	NCAA Eligibility Verification	PM		PM				
	6.2.148	Pass/Fail Requests	AC+1		AC+1		AC=End of academic term.		
	6.2.149	Permanent Record Card	PM		PM				
	6.2.150	Personal Data Information Forms	AC+1		AC+1		AC=Graduation or date of last attendance		
	6.2.151	Placement/Career Planning Records	AC+5		AC+5		AC=Graduation or date of last attendance		
	6.2.152	Rank in Class Report	PM		PM				

Retention Codes (Field 7)	Archival Codes (Field 8)
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STATE OF TEXAS

Records Retention Schedule

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2. Agency Code: 743		3. Agency Name: The University of Texas at San Antonio						
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			

4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period Agency	7. Retention Period Storage	7. Retention Period Total	8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
	6.2.153	Registration Forms	PM		PM	Hard Copy destroyed after document is microfilmed.		
	6.2.154	Release of Degree Info	CE+1 MO		CE+1 MO			
	6.2.155	Request Change of Undergraduate Catalog of Graduation Form	PM		PM			
	6.2.156	Request for Veteran Certification	AC+3		AC+3	AC=End of semester submitted		
	6.2.157	Request of Special Classroom	AC+1		AC+1	AC=End of semester submitted		
	6.2.158	Request of Student to Obtain Copies of Educational Records	PM		PM			
	6.2.159	Requests to Reduce Course Enrollment	AC+1		AC+1	AC=End of semester submitted		
	6.2.160	Requests to Withdraw Graduation Application	AC+5		AC+5	AC=End of semester submitted		
	6.2.161	Requirements for Removal of Incomplete	PM		PM			
	6.2.162	Residence Questionnaire Form - All related documents. Also includes 3-part military form.	PM		PM			
	6.2.163	Scholastic Dishonesty Record - Record includes nature of charge, disposition, sanction assessed and any other pertinent information.	AC+5		AC+5	AC=Graduation or date of last attendance. CAUTION: If this results in disciplinary action the records must be retained permanently. SEE 6.2.126.		
	6.2.164	Student Health History Forms	AC+3		AC+3	AC=Graduation or date of last attendance.		
	6.2.165	Transcript Requests & Releases	AC+1		AC+1	AC=Date of request. Hard Copy destroyed after document is stored electronically.		
	6.2.166	Transfer Credit Evaluations	PM		PM	Hard Copy destroyed after document is stored electronically.		

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2. Agency Code: 743		3. Agency Name: The University of Texas at San Antonio						
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			Agency	Storage	Total	9. Remarks		

	6.2.167	Tuition and Fee Charges	AC+5		AC+5		AC=One year after graduation or date of last attendance		
	6.2.168	Tuition Rebate	PM		PM				
	6.2.169	Undergraduate Letter of Good Standing	PM		PM				
	6.2.170	Withdrawal Authorizations	AC+15		AC+15		AC=Graduation or date of last attendance.		
	6.2.171	Student-Athlete Education Records - Including student-athlete statement. Results of drug test, high school & all college transcripts, precollege test scores & related information and correspondence, records concerning financial aid, other documents obtained pertaining to NCAA eligibility.	AC+10		AC+10		AC=graduation or date of last attendance. Subject to NCAA investigative review.		
	6.2.172	Athletic Recruitment Records	AC+10		AC+10		AC=after graduation or date of last attendance		
	6.2.173	NCAA Compliance Record - Including certification of compliance form, student-athlete statement, drug testing consent form, student-athlete affirmation.	7		7				
	6.2.174	NCAA Compliance Records - Including squad list, graduation-rates disclosure records.	7		7				
	6.2.175	NCAA Compliance Records - Including information and sports sponsorship, and designation of institutional representatives.	7		7	I	Subject to NCAA Review.		
	6.2.176	Conference USA Compliance Records - To include hardships.	7		7	I			

Retention Codes (Field 7)				Archival Codes (Field 8)			
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AV – As Long As Administratively Valuable	FE – Fiscal Year End	MO – Months	US – Until Superseded	O – Review by UTSA Archivist			



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			Agency	Storage	Total				9. Remarks

	6.2.177	Rules & Regulations - Including NCAA rules-interpretations records and/or files and documentation to substantiate the dissemination and communication of rules education material.	US+10		US+10	Subject to NCAA review.		
	6.2.178	Insurance Policies for Athletes	AC+4		AC+4	AC=Expiration or termination of policy; UT System retain 20 years		
	6.2.179	Student-Athlete Medical / Insurance Records and Insurance Claim Files - Including claims for injuries to student-athletes and correspondence.	AC+10		AC+10	AC=after graduation or date of last attendance or after case closed		

STUDENT RECORDS

Section 6.3 – Certification Data/Documents

	6.3.100	Class Rolls – Certification	PM		PM	Maintained electronically. Hard copy destroyed.		
	6.3.101	Enrollment Verifications	AC+1		AC+1	AC=Verification		
	6.3.102	Financial Aid Program Records	AC+5		AC+5	AC=Graduation or date of last attendance		
	6.3.103	Social Security Certifications	AC+1		AC+1	AC=Certification		
	6.3.104	Teacher Certifications and Supporting Documentation	AC+15		AC+15	AC=Until after Graduation		
	6.3.105	Veterans Administration Certification	AC+3		AC+3	AC=Graduation or date of last attendance		

STUDENT RECORDS

Section 6.4 - Publications, Statistics, Institutional Reports

	6.4.100	Academic Calendar - Final Copy	PM		PM			
	6.4.101	Commencement Program	PM		PM			

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PM – Permanent	US – Until Superseded



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2. Agency Code: 743		3. Agency Name: The University of Texas at San Antonio						
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			Agency	Storage	Total			

6.4.102	Degree Statistics	PM		PM			
6.4.103	Enrollment Statistics	PM		PM			
6.4.104	Grade Statistics	PM		PM			
6.4.105	Racial/Ethnic Statistics	PM		PM			
6.4.106	Schedule of Classes (institutional)	PM		PM			
6.4.107	Theses, Dissertations, Comprehensives and Manuscripts	PM		PM	I		
6.4.108	University Catalogs	PM		PM	I	ARCHIVES NOTE: The archival requirement is met by sending the required copies of the catalogs to the University Archives and to the Texas State Publications Depository Program, Texas State Library and Archives Commission.	
6.4.109	University Surveys - Fall Staff Survey, Graduation Rate Survey, UTSA Student Survey of Teaching, Course Instructor Survey, Integrated Post-Secondary Education Data System (IPEDS), Surveys of Enrollment, Competitions, Characteristics, Salaries, Tenure, Fringe Faculty, etc.	AC+10		AC+10		AC=September 1 of odd-numbered calendar years.	
6.4.110	Daily Injury Report	AC+5		AC+5		AC=after graduation or date of last attendance or after case closed	
6.4.111	External Fiscal Reports - NCAA Reports	FE+3		FE+3			
6.4.112	Media Guides for Individual Sports	PM		PM			
6.4.113	Sports Statistics	PM		PM			

STUDENT RECORDS

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

Section 6.5 - Family Educational Rights and Privacy Act Data/Documents

	6.5.100	Requests for Formal Hearings	AC+2		AC+2	AC=After closed/terminated.		
	6.5.101	Requests and Disclosures of Personally Identifiable Information (where information is disclosed to a student or other individual on behalf of the student)	2		2			
	6.5.101.1	Requests and Disclosures of Personally Identifiable Information (where information is disclosed to individuals other than student or others on behalf of the student)	PM		PM			
	6.5.102	Student Requests for Nondisclosure of Directory Information	US/AV		US/AV	US or AV after termination of enrollment, as applicable.		
	6.5.103	Student Statements on Content of Records Regarding Hearing Panel Decisions	AC		AC	AC=Terminate at same time as pertinent student record		
	6.5.105	Waivers for Rights of Access	AC		AC	AC=Until terminated by the student, or terminate at same time as pertinent student record		
	6.5.106	Written Decisions of Hearing Panels	AC+2		AC+2	AC=After decision rendered, if not appealed.		
	6.5.107	Team Rosters and Photographs - Including photographic documentation of athletic events.	PM		PM	I		

STUDENT RECORDS

Section 6.6 - Other Student-Related Records

	6.6.101	Alumni Records	PM		PM			
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			Agency	Storage	Total			

	6.6.102	Child Development Center Attendance Records - Record of attendance in the child care facility. Sign-in and sign-out sheets as well as all correspondence and documentation or arrivals and departures from the facility.	AC+3 MO		AC+3 MO	AC=Date of last attendance		
	6.6.103	Child Development Center Records - Records of enrollment, admission and activities of children in child care facility. Includes application for admission, emergency authorization forms, medication authorization forms, incident forms, immunization records, permission to participate in field trips and any other documents relating to the children. Includes documentation of suspected child abuse.	AC+5		AC+5	AC=Date of last attendance		
	6.6.104	Counseling Records - Academic	AC+5		AC+5	AC=Completed CAUTION: Not including mental health counseling records (6.2.142).		
	6.6.105	Instructional Materials	US		US	O		
	6.6.106	Internship Contracts - Related documentation	AC+5		AC+5	AC=Termination of Employment		
	6.6.107	Library Holdings - Card or automated catalogs, shelf lists, etc.	US		US	Holdings are not state records, but finding aids are.		

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	6.6.108	Registered Student Organizations – copies of documents including organizations’ constitution(s), semester registration forms, requests to create email account and/or on-campus agency account, deposit and withdrawal forms, correspondence related to the organization, IRS letter indicating the organization’s EIN, programs or advertisements for events, disciplinary records (rosters, letters, summary notes, etc.).	AC+5		AC+5	O	AC=termination of organization and/or relationship with UTSA		
	6.6.109	Student Housing Files – student resident files to include lease agreements and supporting documents	AC+4		AC+4		AC=expiration of contract/lease agreement		

AGENCY PROGRAM RECORDS
Section 7.1 - Research and Development Records

	7.1.100	Chemical Analysis Reports	5		5		Texas AgriLife Research -Texas State Chemist		
	7.1.101	Research Grant Information	AC+3		AC+3		AC=Completed CAUTION: Retention may be governed instead by 4.7.108.		
	7.1.102	Research Proposals - Accepted (Funded)	AV		AV		See also 4.7.108.		
	7.1.103	Research Proposals - Denied (Not Funded)	3		3		See also 4.7.108.		

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