



**STATE OF TEXAS**  
**Records Retention Schedule**

SLR 105  
 Rev. 2017-07

Retention Codes (field 7)

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

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 US – Until Superseded

Archival Codes (Field 10)

A/I – Transfer to State/University Archivist  
 R/O – Review by State/University Archivist

1. Agency Code: 714		2. Agency Name: UT at Arlington									
3. Agency Item No.	4. Record Series	5. Record Series Title	6. Description	7. Ret. Code	8.			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
ACAD1	1.1.070	Academic Procedures	Procedures used by academic departments.	AC	3			AC= Until superseded, or termination of program, rules, policies, or procedures, whichever applicable.	O	ARCHIVES NOTE: Working files and related documentation used in creating the final rules, policies, and procedures, are not subject to archival requirement and may be disposed of at the expiration of the retention period.	
ACAD2	1.1.070	Academic Procedures Working Files	Working files used to develop academic procedures.	AC	3			AC= Until superseded, or termination of program, rules, policies, or procedures, whichever applicable.		ARCHIVES NOTE: Working files and related documentation used in creating the final rules, policies, and procedures, are not subject to archival requirement and may be disposed of at the expiration of the retention period.	
ACAD3	15.2.001	Academic Action Authorizations	Authorizations for academic actions, such as academic probation, suspensions, dismissals, reinstatements, etc.	AC	3			AC= graduation or date of last attendance		CAUTION: See URRS 15.5.007 for disciplinary action records. URRS-172	
ACAD4	15.2.019	Holds and Encumbrances	Documents used to place and remove holds on registration, student services, or the release of transcripts or other academic data until the subject of the hold/encumbrance takes a specific action.	AC				AC= date of release	O	URRS-116	



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ACAD5	18.1.003	Student Organization Administrative Records	This series documents the history, development, and policies of campus student organizations. This series may include but is not limited to: constitutions and bylaws; publications (websites, newsletters, fliers, brochures, posters, and other publications); annual review forms; annual reports; meeting minutes and supporting documentation; committee, subcommittee, and task-force records; Student Senate bill and resolution files; budgets; handbooks; officer and member rosters; scrapbooks; photographs; press releases; clippings; social media accounts; and related documentation and correspondence that documents programs, activities, and events.	AV	1					CAUTION: Faculty sponsors of student organizations should remind students that many of the electronic records they create for the organization are records that must be retained and then transferred to the University Archives, and that students must take care to retain these records in whatever manner the University decides is best. URRS-302	
ACAD7		Disciplinary Records for Student Organizations		AC	7			AC= Fulfillment of penalty			



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ACAD8	17.1.002	Class Scheduling Records - Published Schedule of Classes	This series documents the formulation of class schedules by academic departments for inclusion in the published schedule of classes. This series includes the final edition of the schedule of classes.	PM					O	URRS-271	
ACAD9	17.1.003	Class Scheduling Records - Working Files	This series documents the formulation of class schedules by academic departments for inclusion in the published schedule of classes. This series may include but is not limited to: requests from departments for class offerings; deviation from schedule forms; copies of course schedule maintenance forms; requests for class changes; working papers; and related documentation and correspondence.		1					URRS-270	
ACAD10	15.2.006	Class Schedules of Students	This series provides a list of the classes registered for by an individual student for a particular semester.	AV						URRS-132	



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ACAD11	17.1.010	Course Schedule Maintenance Forms	This series documents requests for changes to be made to the institutional catalog and schedule of classes. The forms include: course numbers; course titles; locations; grading modes; course descriptions; designators; fees; and credit hours.		2					URRS-266	
ACAD12	17.1.009	Course Records	This series provides a record of departmental course offerings and individual course contents. This series may include but is not limited to: syllabi; course descriptions; course outlines; course summaries; course requests and proposals; curriculum approval lists; lists of classes by term; bibliographies; reading lists; course announcements; handout materials; and related documentation and correspondence.	AC	2			AC= End of semester in which course is taught.		URRS-267	Texas Education Code Section, 51.974.



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ACAD14	15.5.003	Class Lists	This series provides instructional units with an official record of students enrolled in courses taught. The series is used to cross-check students who have enrolled against those who have registered as well as in the generation of statistical reports. Information in the series includes: student names; social security numbers or other student identification numbers; term; and enrollment/registration status.	AC				AC= When the list of students who have enrolled has been cross-checked with the list of students who have registered.		CAUTION: Class lists often have long-term value in the generation of statistical and other reports. They should be reviewed before disposal, as some of these records may merit long-term or permanent retention. URRS-351	



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ACAD15	15.5.009	Student Statistical Reports - Raw Data	Includes raw data or working files used to create annual or summary Student Statistical Reports. Series may include: specialized listings and statistical reports pertaining to departmental and college registration, course changes, add/drops, geographical distribution of students, student age and gender data, mortality of classes, student transfers from other schools, student body grade point averages and GPAs of living groups, and veterans enrollment; reports documenting student and enrollment by term; and reports on other topics.	AV						URRS-178	
ACAD16		Deceased Student Files		AC	7			AC= notification of death		URRS-178	
ACAD17	15.5.002	Admissions/Enrollment Reports	Summary and statistical information relating to student admission programs which may be used for control, planning or review. May include THECB reports, reports sent to administration, or beginning of semester enrollment reports sent to office of institutional research.	PM						For raw data or working files used to create these reports, see RRS 1.1.065. URRS-177	



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ACAD18	15.2.010	Enrollment Census Reports (4th and 12th Class Day Rosters)	Attendance reports prepared by faculty on class census day and used as source documentation for enrollment reports submitted to the Texas Higher Education Coordinating Board.	FE	3					URRS-357	
ACAD19	15.5.006	Statistical Reports	Annual statistical reports related to academic subjects, such as admissions reports, enrollment statistics, grades, graduates/degree statistics, racial/ethnic composition, and other education-related matters submitted to the governing body, state or federal agencies, or accrediting organizations.	PM					I	URRS-179	
ACAD20		Freshman Leaders on Campus (FLOC) Applications		AV							
ACAD21	17.1.017	Goolsby Leadership Academy Records	This series documents the administrative activities of the Goolsby Leadership Academy.		7					URS-259	



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ACAD23	18.1.003	Greek Student Organizations	This series documents the history, development, and policies of campus Greek student organizations. This series may include but is not limited to: constitutions and bylaws; publications (websites, newsletters, fliers, brochures, posters, and other publications); annual review forms; annual reports; meeting minutes and supporting documentation; committee, subcommittee, and task-force records; Student Senate bill and resolution files; budgets; handbooks; officer and member rosters; scrapbooks; photographs; press releases; clippings; social media accounts; and related documentation and correspondence that documents programs, activities, and events.		5				I	URRS-302 CAUTION: Faculty sponsors of student organizations should remind students that many of the electronic records they create for the organization are records that must be retained and then transferred to the University Archives, and that students must take care to retain these records in whatever manner the University decides is best.	





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ACAD24	16.5.002	Career Counseling and Placement Records	Used to assist students in planning career goals and objectives. This series also provides prospective employers with a record of students' scholastic and personal data. Information may include, but is not limited to, career goals, academic credentials, personal data, work experience, honors, distinctions, consent forms for release of information, records regarding graduation or last date of attendance, and related information.	AC	5			AC= graduation or date of last attendance		URRS-250	
ACAD25	17.1.004	Commencement Records	This series documents commencement program planning and implementation at the institution. This series may include but is not limited to: commencement attendance forms; planning records created by commencement committees or other planning groups; and related documentation and correspondence.	AC	4			AC= After commencement events.	O	URRS-256	



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ACAD26	17.1.005	Continuing Education Course Records - Final Reports	This series documents for-credit and not-for-credit course offerings and individual course contents as offered by Continuing Education (also called "extension" classes). This series comprises final and summary reports, including Texas Higher Education Coordinating Report CBM00X, for students in self-supporting courses and programs.	PM					O	URRS-269.	



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					Years	Months	Days					
ACAD27	17.1.006	Continuing Education Course Records -Working Files	Some of these records may affect accreditation, and should be kept long enough to meet accreditation cycle requirement (i.e., if an accreditation cycle is 7 years, then these records should be kept for at least 7 years). This series documents for-credit and not-for-credit course offerings and individual course contents as offered by Continuing Education (also called "extension" classes). These records include: syllabi; course descriptions; course outlines; course request proposals; enrollment reports; course summaries; request for undergraduate and graduate course and instructor approval forms; nominations to the undergraduate faculty; course announcements; handout materials; budget requests; budget status forms; vouchers; and related documentation and correspondence.		5						CAUTION: Some of these records may affect accreditation and should be kept long enough to meet accreditation cycle requirement. URRS-268	



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ACAD29		Carnegie Foundation Community Engagement Classification	The Carnegie Foundation’s Classification for Community Engagement is an elective classification which involves data collection and documentation of important aspects of institutional mission, identity and commitments and requires substantial effort invested by participating institutions. It is an special-purpose classification for higher education institutions with commitments in the area of community engagement. The classification is not an award. It is an evidence-based documentation of institutional practice to be used in a process of self-assessment and quality improvement. The documentation is reviewed by a National Review Panel to determine whether the institution qualifies for recognition as a community-engaged institution.		5				O		



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ACAD30	15.2.007	Course Registration and Status Records	Registration forms, class rosters, and similar records providing information on which courses student are registered for at the beginning of an academic term, including documentation evidencing the conditions under which courses are undertaken (e.g., audit, pass/fail, and credit/no credit authorizations or approvals) or evidencing changes to registration status during the term (e.g., add/drop forms by student or instructor).	AV						CAUTION: Not to be confused with withdrawal records. See URRS 15.2.035. URRS-135	
ACAD31	15.2.008	Curriculum Change Authorizations	This series documents student requests to change their field of major study, add or remove a simultaneous major, or add or change a minor.	AV						URRS-131	
ACAD33		Hall of Honor Files	This series includes documentation of inductees into the Military Science Hall of Honor.		5				O		
ACAD35	15.2.026	Student Advising Records	This series includes records of academic advisement to students. Series may include advisors' notes, advising checklists, and convenience copies of grade records maintained by registrars.	AC	3			AC= student separation from the department or the institution		URRS-171	



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ACAD36	11.1.012	Student and Alumni Surveys/Questionnaires	These are not course- instructor surveys.	AC	3			AC=final disposition of summary report		CAUTION: See URRS 17.1.019 for course-instructor surveys.	
ACAD37	15.2.030	Thesis and Dissertation Records	This series documents the completion and academic acceptance of graduate theses and dissertations presented to colleges in fulfillment of requirements for graduate degrees. This series includes final and accepted copies of theses and dissertations.	PM					I	URRS-117.	
ACAD38		Registration Summaries	This series includes cumulative reports detailing how many students are enrolled in each class section.	AC	5			AC= end of semester			



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ACAD40	17.2.001	Professional Accreditation Records - Working Files	This series documents the accreditation process for the schools, colleges, units, and related programs. The series provides a record of materials compiled for inclusion in a report packet sent to the appropriate professional accreditation board for the specific program or service and usually includes statements on mission, finance, educational programs and departments/divisions make up. Most accreditation organizations produce an evaluation report based on the packet and on-site inspection, which is used to determine accreditation for the units and their programs. This series may include but is not limited to: statistical data; working papers; and related documentation and correspondence.	AC				AC= end of 2 accreditation cycles		URRS-274	



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ACAD41	17.2.002	Professional Accreditation Reports	This series documents the accreditation process for the schools, colleges, units, and related programs. The series provides a record of materials compiled for inclusion in a report packet sent to the appropriate professional accreditation board for the specific program or service and usually includes statements on mission, finance, educational programs and departments/divisions make up. Most accreditation organizations produce an evaluation report based on the packet and on-site inspection, which is used to determine accreditation for the units and their programs. This series may include but is not limited to: self-evaluation reports; final reports sent to accreditation organization; accreditation organization evaluation report; and related documentation and correspondence.	PM					O	URRS-275	





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ACCF1	4.7	Account Profiles	New Cost Center and Project set up request which details purpose of account and funding sources with department approvals.	AC	3			AC= life of account			
ACCF2	4.5.003	Annual Financial Report	Annual Financial Reports (AFR) required by the General Appropriations Act (100 Day Report).	AC	6			AC= September 1 of odd-numbered calendar years.		ARCHIVES NOTE: The final version of Annual Financial Reports must be submitted to the Texas State Publications Depository Program per 13 TAC 3.3(a)(2)(a). Working files and related documentation used in creating the final plan are not subject to archival review and may be disposed of at the expiration of the retention period. CAUTION: If an agency does not produce a biennial or annual narrative report as described in RSIN 1.1.066, then these annual financial reports must be marked with Archival Code A. 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.	13 TAC 3.3(a)(2)(a)



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ACCF4	1.1.062	Consent Agenda Support Documents (UT System Board of Regents Meetings)	Records include explanatory documentation for items placed on agenda.		2				I	See caution comment at RSIN 1.1.058.	
ACCF5	15.3.001	Fee Assessment Forms	This series documents the payment of fees for course fees, lab time, diplomas, commencement exercises, etc.	AC	5			AC= graduation or date of last attendance		URRS-150	
ACCF6	4.1.009	Fee audit Reports and Billing Detail	Reports ran every term after calculating tuition to verify tuition charges on student accounts.	FE	3						
ACCF7	4.7.013	Federal Tax Information (FTI) Audit Logs	Logs documenting requests and receipt of FTI, including any information created by the recipient that is derived from federal return or return information received from the IRS or obtained through a secondary source.		5						IRS Publication 1075
ACCF8	4.7.014	Indirect Cost Plans	Indirect cost plan and supporting documentation created or maintained in the development of the plan.	AC	3			AC= If submitted for negotiation of rate, date of submission; if not submitted for negotiation, the end of the fiscal year covered by the proposal, plan, or other computation.			2 CFR 200.333(f)(1) and (2).



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ACCF9	5.1.013a	Insurance Policies - 9/1/2015 and After	Liability, theft, fire, health, life, automobile, and other policies for government property and personnel including supporting documentation relevant to the implementation, modification, renewal, or replacement of policies. Executed, renewed, or amended on or after September 1, 2015.	AC	7			AC= Expiration or termination of the policy according to its terms.			SB20 (84th Leg.)
ACCF10	4.5.002	Fiscal Management Reports	Internal and external periodic fiscal management reports and associated worksheets, including federal financial reports, salary reports, HUB reports, investment performance reports, etc.	FE	5			CAUTION: This series does not include fiscal reports created to fulfill grant requirements. See RSIN 4.7.008.			
ACCF11	4.7.010	Long Term Liability Records	Records documenting financial obligations of a state agency that are not payable within one year of the date of the balance sheet, including debentures, loans, deferred tax liabilities, bonds, and pension obligations.	AC	3			AC=retirement of debt			
ACCF12	4.1	Monthly Financial Statements	Departmental monthly financial statement used in reconciling financial statements.	FE	3						
ACCF13	4.1.009	State Fund Reconciliations	Monthly reconciliation of funds held in state treasury.	FE	3						



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ACCF15	4.1.009	Vending Commission Reports	Monthly reports with the breakdown of commission per vending machine location.	FE	3						
ACCF16	4.5.002	Work Papers for Preparing Fiscal Management Reports		FE	5			CAUTION: This series does not include fiscal reports created to fulfill grant requirements. See RSIN 4.7.008.			
ACCF18		General and Subsidiary Ledgers	Transaction data posted from General Ledger journals and from Subledgers. GL Transaction data includes key fields such as GL Account, Department Number, Cost Center or Project Number, Fund Code, NACUBO Function, Amount, and Accounting date. Subledgers includes Accounts Payable, Accounts Receivable, Billing, Asset Management, Expenses. Subledger Transaction data includes other key fields such as Vendor Name, Invoice Number, Customer Number, Asset ID Number, etc.	FE	3						
ACCF19	4.5.007	Uniform Statewide Accounting System (USAS) Reports - Periodic	Periodic reports compiled from information entered into USAS.	AC				AC= receipt and reconciliation of annual report			



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ACCF20	4.5.009	USAS Annual Reports	Yearly report compiled from information entered into USAS.	FE	3						
ACCF21	5.1.013b	Insurance Policies – 8/31/2015 and Prior	Liability, theft, fire, health, life, automobile, and other policies for government property and personnel including supporting documentation relevant to the implementation, modification, renewal, or replacement of policies. Executed, renewed, or amended on or before August 31, 2015.	AC	4			AC= Expiration or termination of the policy according to its terms.			SB20 (84th Leg.)
ANALYT1	1.1.064	University Accountability Data	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					See RSIN 1.1.068 for reports on agency performance measures. 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.	
ANALYT2	15.5.002	Texas Higher Education Coordinating Board Reports		PM						URRS-177 For raw data or working files used to create these reports, see RRS 1.1.065.	
ANALYT3	15.1.001	Data received from National Student Clearinghouse	This series includes educational record verifications received from the National Student Clearinghouse.	AC	3						



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ANALYT4		Results of ad hoc Data Requests	This series includes the request and results for data requests made to University Analytics.	AV							
ANALYT5	1.1.067	Integrated Postsecondary Education Data System (IPEDS) Reports	This series includes all reports required to be submitted through the Integrated Postsecondary Education Data System (IPEDS) to the US Department of Education.		3				O	See RSIN 1.1.065 for raw data used to produce reports. ARCHIVES NOTE: Reports are archival when they deal with significant aspects of the agency's programs.	
AP1	4.1.001	Accounts Payable Information	Claims; invoices; statements; copies of checks and purchase orders; expenditure authorizations; ledgers; encumbrance, purchase, general journal, expenditure, and special vouchers; and similar records that serve to document disbursements, including those documenting claims for and reimbursement to employees for travel and other expenses.	FE	3						



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AP4	5.3.007a	Bid Documentation – 9/1/2015 and After	Includes bid requisition/authorizations, invitations to bid or propose, bid specifications, awarded and unawarded bids, and bid tabulation /evaluations. Associated with a contract executed, renewed, or amended on or after September 1, 2015.	AC	7			AC= expiration or termination of the instrument according to its terms or decision not to proceed with the bid			SB20 (84th Leg.)
AP5		Procard Applications	This series includes the application for all employees who apply for a University Purchasing Credit Card	AC	1			AC- cancellation of card			
AP6		Procard Records	A record of purchases made with a university procurement card. This records series may include but is not limited to: transaction log/statement, original charge slip, sales receipt, packing slip, invoice, or any other information related to the purchase	FE	3					URRS-82	
AP10		Textbook Orders	A record of the textbooks ordered by a department/employee for use in the classroom.	FE	3						



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AP11	5.3.010	Vendor Records/W-9	W-9 IRS Form used to request a taxpayer identification number (TIN) for reporting information to the Internal Revenue Service (IRS). This includes W-9 forms received by a state agency from vendors.	AC	3			AC= date account is opened or date instrument is purchased			26 CFR 31.3406(h)-3(g)
AP12	5.3.007b	Bid Documentation – 8/31/2015 and Prior	Includes bid requisition/authorizations, invitations to bid or propose, bid specifications, awarded and unawarded bids, and bid tabulation /evaluations. Associated with a contract executed, renewed, or amended on or before August 31, 2015.	FE	3						SB20 (84th Leg.)
AP13	5.3.007c	Bid Documentation – Invalid Bids	Invalid bids that do not meet agency submission requirements and are not included in bid evaluation process (e.g. withdrawn, missed submission deadline, incomplete submission, etc.)	AC	2			AC= date of notification of denial or date of withdrawal, as applicable			
AR1	15.3.012	Installment Tuition Loan Promissory Notes	Any document evidencing a promise to pay signed by a student to repay a student debt.	AC	3			AC= date of final repayment or cancellation		URRS-381	





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AR2	13.1.001	Ticket Sales Records - Other	This series documents the printing, selling, distribution, and accounting of tickets for university-sponsored performing arts and other non-athletic events where tickets are sold for admission. Records may include: ticket stock orders; ticket type reports; ticket purchase manifest forms; box office balance sheets; ticket printing and control records; season ticket sales lists; receipts and orders for mail, phone, or in-person purchase of tickets; ticket sales summary sheets and reports; free ticket sign-up sheets; lists and reports of free tickets distributed to patrons, contributors, and others; deposit receipts; and related documentation and correspondence.	FE	3					URRS-71	
AR4	4.7.003	Returned Checks, Warrants, and Drafts – Uncollectable Accounts	Records of accounts deemed uncollectible, including write-off authorizations and returned checks, warrants, and drafts.	AC	3			AC= Date account deemed uncollectable.			



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AR6	4.1.009	Accounts Receivable Information	Bill copies or stubs, statements, billing registers, account cards, deposit warrants, cash receipts, credit card receipts, receipts books, cash transfers, daily cash reports, reconciliations, general journal vouchers, special vouchers, and similar records that serve to document money owed to or received by a state agency and its collection or receipt.	FE	3						
ATH1	18.2.001	Athletic Eligibility Records	Academic progress reports used to provide a record of verification by intercollegiate athletics of student athletes' academic progress to the National Collegiate Athletic Association (NCAA) or National Association of Intercollegiate Athletics (NAIA).	AC	10			AC= Student separation from the department or university.		URRS-337	



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ATH2	18.2.002	Athletic Scholarship and Grant-In-Aid Award Records – National Collegiate Athletic Association (NCAA) Records	This series is used to provide athletic departments with information pertaining to player eligibility and receipt of financial aid in the form of scholarships including grant-in-aid scholarships, to monitor accounts, and to assist in complying with NCAA, and conference rules and regulations. These records include: squad lists which furnish summary information; conference eligibility reports; team roster update sheets; scholarship count sheets showing who is on the schedule to receive aid; applications; nominee lists; eligibility questionnaires; eligibility reports which determine years of eligibility unused; credit voucher request sheets notes; and related documentation and correspondence.		10					URRS-161	



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ATH4	18.2.004	Catastrophic Injury Insurance Records	This series documents on-going insurance activity on cases that qualified for catastrophic status by having claims of over \$50,000 for NCAA schools and \$25,000 for NAIA schools in the first two years of the claim. This series may include but is not limited to: accident reports; annual insurance questionnaires; notes; claim forms; and related documentation and correspondence.	AC	5			AC=Closure of claim		URRS-336	
ATH5	18.2.005	Competition Record - NCAA Reporting Requirements	This series provides a summary record of individual games and competitions and is used to comply with NCAA and NAIA reporting requirements for both revenue and non-revenue producing sports. Information on the individual forms includes: sport name; opponent name; date; event location; final score; player names and positions; time played per athlete; and the signature of the head coach or athletic director.		10					URRS-334	



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ATH6	18.2.006	Competition Scheduling Records	This series documents competition schedules set up with other institutions by coaches and the athletic director. This series may include but is not limited to: correspondence; phone notes; contracts; final schedules; and related documentation and correspondence.	AC	7			AC=Expiration of Contract		URRS-319	
ATH7	18.2.007	Drug Test Records - Negative Results	This series is used to provide the athletic director with a record of the negative results of drug testing done on student athletes. These records include: lab reports; interpretations; and related documentation and correspondence.		2					URRS-322	
ATH8	18.2.008	Drug Test Records - Positive Results	This series is used to provide the athletic director with a record of the positive results of drug testing done on student athletes. These records include: lab reports; interpretations; and related documentation and correspondence.	AC	5			AC = End of eligibility.		URRS-323	



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ATH9	18.2.009	Game Arrangement Records	This series is used to provide a reference record of arrangements made for and the schedules of past games. This series may include but is not limited to: team practice schedules; team position assignments/depth charts; itineraries; bus lists; notes; and related documentation and correspondence.	AC	5			AC=End of sport season.		URRS-332	
ATH10	18.2.010	Game Day Totals	This series documents the total ticket and concession sales, including concession items other than food or drink and NCAA licensed merchandise, for each sporting event.	FE	3					URRS-311	
ATH11	18.2.011	Game Officials' Evaluation Forms	This series is used to provide a record of the head coach's evaluation of judging officials' performance at individual football games. The series is also used to comply with NCAA, NAIA and conference rules and regulations. Information on the individual forms includes: team names; site; game date; judging officials' names; evaluative scores; comments; and coach's signature.		1					URRS-331	



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ATH12	18.2.012	Game Statistics	This series documents the practice, playing, and attendance statistics about each game and the season for each sport by playing year. This series may include but is not limited to: player academic statistics; attendance figures; player training charts; season and game player statistics; recruitment records; special teams statistics; rankings; awards information; NAIA and NCAA game statistics; media releases; all-conference nominations; spring and fall camp depth charts; numerical rosters; media guides; narrative reports on games and scrimmages; final team statistics for each game; NAIA and NCAA official scoring summaries; play-by-play written reports; and related documentation and correspondence.		75				O	URRS-330	
ATH13	18.2.013	Game Tickets and Ticket Orders	This series documents the sale and purchase of season passes and game day tickets. This series may include but is not limited to: extra game tickets, ticket orders, season pass order forms, and ticket stubs.	FE	3					URRS-309	



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ATH14	18.2.014	Individual Athletes Records - Confidential	This series includes confidential records of the athletic history of each athlete who has competed at the institution. Frequently, this series is a continuation of the recruitment file and includes recruitment records if an athlete signs a letter of intent. This series may include but is not limited to: academic major information including performance reports, admissions verification reports, academic transcripts, and financial aid information, recruitment information documents, and related documentation and correspondence.	AC	5			AC = Date of separation from the institution.		URRS-327 URRS 18.2.015 for records relating to the public profile of the athlete.	See





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ATH15	18.2.015	Individual Athletes Records - Public Profile	This series documents the athletic history of each athlete who has competed at the institution. Frequently, this series is a continuation of the recruitment file and includes recruitment records if an athlete signs a letter of intent. Records may include and may not be limited to: academic major information including performance reports, admissions verification reports, recruitment information documents, media articles; photographs, release of information forms, personal data questionnaires, records of awards, and related documentation and correspondence.	PM					O	URRS-326 URRS 18.2.014 for records relating to the public profile of the athlete.	See
ATH16	18.2.016	Play Books	This series documents the strategies, practice time and game plays for each game in the season. This series may include but is not limited to: practice plans; game plans; and game results.		5					URRS-324	



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ATH17	18.2.017	Practice Schedule Records	This series is used to monitor practice time for athletic teams and assist in complying with NCAA, NAIA and conference rules and regulations. This series contains team rosters indicating time spent in: practices; meetings; training and conditioning; and competition.		5					URRS-321	



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ATH18	18.2.018	Recruiting Records - Athletics	This series documents the recruitment of athletes into the institution's intercollegiate athletics program. The series also provides a record of the recruitment process for prospective players created by the institution to comply with NCAA, NAIA and conference rules and regulations. This series may include but is not limited to: the institution's football questionnaire forms with personal, scholastic, football, general, and transcript release information; information request cover sheets; grade transcripts; Information for Certification of NCAA Freshman Athletics Eligibility Compliance (with By-Law 5-1-j forms, number 40-c); letters of intent; copies of admissions forms and materials; performance reports; telephone and conversation notes; mailing lists; and related documentation and correspondence.	AC	5			AC=End of eligibility.		URRS-320	



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ATH19	18.2.019	Sports Merchandising Records	This series documents the sale of institutional and NCAA or NAIA-licensed merchandise at sporting events. This series may include but is not limited to: sales reports; merchandise comment sheets; and related correspondence.	FE	3					URRS-318	
ATH20	18.2.020	Student Athlete Insurance Records - Collegiate Insurance	This series documents medical treatment services rendered off campus for practice or playing related injuries or illnesses which are eligible for partial payment by intercollegiate athletic insurance. This series may include but is not limited to: copies of policies; accident reports; annual insurance questionnaires; notes; claim forms; negotiations correspondence; payment of insurance records; and related documentation and correspondence.	AC	7			AC= Last date on which service was given or until the patient's 21st birthday, whichever later.		URRS-325	22 TAC 165.1(b)



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ATH21	18.2.021	Student Athlete Insurance Records - Secondary Coverage Insurance	This series documents the verification and payment of secondary coverage insurance claims of injured student athletes. This series may include but is not limited to: lists of requests for claims payment; transmittal letters for reimbursement of the institution; proof of loss forms; intercollegiate athletic reports; ledgers of providers, payment amounts, and reference numbers; and related documentation and correspondence.	AC	7			AC= Claim settled		URRS-335	



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ATH22	18.2.022	Student Athletes Academic Advising Records	This series documents academic advising of prospective and current student athletes, provides records of academic progress while students are involved in athletic programs at the institution, and complies with NCAA, NAIA and conference reporting requirements. These records include: letters of intent; renewals of letters of intent; transcripts; grade reports; petitions; academic evaluations; advanced standing reports; advisors' report sheets showing progress towards academic degree; program planning sheets; NCAA Progress Reports; students' requests for release from athletic programs; disciplinary memoranda; and related correspondence.	AC	5			AC= Degree completed or date of last enrollment.		URRS-317	



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ATH23	18.2.023	Student Athletes Dining Rosters	This series documents the meals consumed by student athletes as part of the training table. This series may include but is not limited to: rosters with the names of athletes partaking of meals and absent from meals; menus; and related documentation and correspondence.		2					URRS-316	
ATH24	18.2.024	Student Athletes Medical Records	This series documents the medical history of each athlete before and during his/her attendance at the institution. This series may include but is not limited to: annual health appraisals; authorization to release information forms; treatment consent forms; assumption of risk forms; accident reports; X-rays and X-ray reports; prescription records; off campus treatment source records; insurance questionnaires; psychological counseling records; and related documentation and correspondence.	AC	7			AC= last date service given or until patient's 21st birthday whichever is later.		URRS-315	22 TAC 165.1(b)



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					Years	Months	Days				
ATH25	18.2.025	Ticket Sales and Event Cash Reconciliation Records - Athletics	This series documents the printing, selling, distribution, and accounting of tickets for university-sponsored athletic events where tickets are sold for admission. A portion of athletic event receipts is shared with visiting teams. This series may include but is not limited to: ticket stock orders; ticket type reports; ticket purchase manifest forms; box office balance sheets; ticket printing and control records; season ticket sales lists; receipts and orders for mail, phone, or in-person purchase of tickets; ticket sales summary sheets and reports; free ticket sign-up sheets; lists and reports of free tickets distributed to patrons, contributors, and others; deposit receipts; and related documentation and correspondence.	FE	5					CAUTION: Records should be kept in compliance with NCAA or NAIA requirements, as applicable. See URRS 13.1.001 for ticket sales and reconciliation records for non-athletic events. URRS-346	
ATH32		Cheerleader Activity Applications		AC	5			AC= choice of applicants			





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AUDIT1	1.1.002	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. The State Auditor's Office retains any copies of its audits performed on Texas state agencies	AC	7			AC= publication or release of final audit findings		The State Auditor's Office (SAO) retains any copies of its audits performed on Texas state agencies. See RSIN 5.4.018 and 5.4.019 for Audit Plan records.	
AUDIT2	1.1.070	Internal Audit Manual and Working Files		AC	3			AC= Until superseded, or termination of program, rules, policies, or procedures, whichever applicable.	O	ARCHIVES NOTE: Working files and related documentation used in creating the final rules, policies, and procedures, are not subject to archival requirement and may be disposed of at the expiration of the retention period.	
AUDIT3	1.1.002	Audit and Investigation Correspondence		AC	7			AC= publication or release of final audit findings			
AUDIT4	5.4.019	Audit Peer Reviews - Working Papers	Documents collected or generated as part of the process of reviewing other state agency internal audit programs. Includes but is not limited to: self-assessments, worksheets, surveys or questionnaires, evaluations, and other documents as described in the State Agency Internal Audit Forum (SAIAF) Peer Review Manual.	AC	1			AC= After final report has been issued		See RSIN 1.1.002 for individual Audit records not related to the peer review of an Audit Plan.	Government Code, 2102.007(a)(5).



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AUDIT5	3.3.030	Audit Training Documentation		AC	2			AC = Close of training session, after training materials superseded, or termination of training program, as applicable.		See RSIN 1.1.043 for external training records. See RSIN 3.1.027 for individual employee training records. CAUTION: Does not include hazardous material training records. See RSIN 5.4.007.	
AUDIT 6	5.4.018	Annual Audit Plan	Includes working papers and agency risk assessment used to develop the plan, per Texas Internal Auditing Act requirement.	AC	7			AC= After final plan has been issued.		See RSIN 1.1.002 for individual Audit records not related to the peer review of an Audit Plan.	Government Code, 2102.007(a)(5).
BANSTU1	4.8.001	Credit Card Transaction Copies and Statements		FE	3						
BANSTU4	4.8.001	Bank Records	Bank statements, credit card statements, cancelled checks, check registers, deposit slips, reconciliations, and other banking related records.	FE	5						
BANSTU5	4.1.009	Balance Sheets for Student Accounts	Daily vault balance sheets and individual cashier balance sheets	FE	3						
BUD1	4.9.001	Annual Operating Budget	Required by the General Appropriations Act. Includes encumbrances and documentation about budget transfers and revisions, as well as detail charts of accounts.	FE	3				I		



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BUD2	1.1.066	Biennial Budget Reports	Biennial reports to the governor and legislature	AC	7			AC= September 1st of odd-numbered years	I	ARCHIVES NOTE: The final version of these agency reports must be submitted to the Texas State Publications Depository Program per 13 TAC 3.3. The requirement is met by sending the required copies of the reports to the Texas State Publications Depository Program, Texas State Library and Archives Commission. Working files and related documentation used in creating the final report may be disposed of at the expiration of the retention period.	
BUD3	4.5.002	Worksheets for Preparing Fiscal Reports		FE	5					CAUTION: This series does not include fiscal reports created to fulfill grant requirements. See RSIN 4.7.008.	
BUD6	1.1.004	Legislative Appropriations Requests (LAR)	Including any supporting documentation created and/or used to justify and support legislative appropriations requests by an agency.	AC	7			AC= September 1st of odd numbered calendar years	I	ARCHIVES NOTE: The final version of Legislative Appropriation Requests must be submitted to the Texas State Publications Depository Program per 13 TAC 3.3(a)(3)(A). Working files and related documentation used in creating the final plan are not subject to archival review and may be disposed of at the expiration of the retention period.	



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CFO1	4.5.010	Unclaimed Property Reports and Documentation	Sufficient records to verify information on unclaimed property previously reported to the State Comptroller showing the name and last known address of the apparent owner of reportable unclaimed property, a brief description of the property, and the balance of each unclaimed account, if appropriate.	AC	10			AC= Date on which property is reportable.			Property Code, Section 74.103(b).
COMPL1		Compliance Reporting Case Files	This records series does not include cases that become the subject of litigation.	AC	1			AC= case is closed due to determination that no investigation is required or the investigation is completed			
COMPL2	5.1.014	Standards of conduct		US	1						
COMPL3	3.3.030	Compliance Awareness Surveys		AC	2			AC = Close of training session, after training materials superseded, or termination of training program, as applicable.		See RSIN 1.1.043 for external training records. See RSIN 3.1.027 for individual employee training records. CAUTION: Does not include hazardous material training records. See RSIN 5.4.007.	
COMPL5	3.3.030	Compliance Training Completion Records		AC	2			AC = Close of training session, after training materials superseded, or termination of training program, as applicable.		See RSIN 1.1.043 for external training records. See RSIN 3.1.027 for individual employee training records. CAUTION: Does not include hazardous material training records. See RSIN 5.4.007.	



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COMPL6	1.1.070	Compliance Work Plan		AC	3			AC= Until superseded, or termination of program, rules, policies, or procedures, whichever applicable.	O	ARCHIVES NOTE: Working files and related documentation used in creating the final rules, policies, and procedures, are not subject to archival requirement and may be disposed of at the expiration of the retention period.	
COMPL7		High Risk Area/Quarterly files	This series includes documents related to the compliance files for areas designated as high risk by the Compliance Executive Committee	FE	3						
COMPL8		Hot Line Information	This series includes complaints made through the University's ethics hotline, and investigation and outcome of those complaints.	FE	3						
COMPL9		Management Leadership Tool	A document developed to educate new administrators of their financial and administrative responsibilities.	AC	3			AC= termination of program			



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COMPL10	2.2.013	Quality Assurance Records	Information verifying the quality of system, hardware, or software operations. Records include but are not limited to: records of errors or failures and the loss of data resulting from such failures; documentation of abnormal termination and of error-free processing; checks of changes put into production; transaction histories; and other records needed as an audit trail to evaluate data accuracy.	AC				AC= No longer needed as an audit trail for any records modified.		For quality control records related to non-IT procedures, see RSIN 5.2.018.	
COMPL12	16.5.003	Child and Youth Program Participant Records	This series documents the participation of children and youth in programs sponsored by the institution. The series may include: applications; registration; enrollment records; progress reports and assessments; immunization records; parental consent forms; activity records; lists of attendees; photographic consent; notice of privacy practice; release and indemnification forms; consents for treatment; and related correspondence.	AC	3			AC= end of program session or student separation from program		URRS-254	



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COMPL13		Camp Program Insurance Documents		FE	3						
COMPL14		Request to Host a Camp/Conference Form and Related Documents	Documents include but are not limited to the Housing Request; the Dining Request; and the Employee Listing submitted to Compliance Services.	FE	3						
COMPL15		Camp Planning Documents	Planning documents include the Communication Plan, Supervision Plan, Transportation Plan and Camp Emergency Plan								
CONTO	5.1.001b	Contract Administration Files – 8/31/2015 and Prior	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, performance bonds, contracts, purchase orders, inspection reports, and correspondence. May also include other applicable documentation in the master contract file per Texas Comptroller of Public Accounts Contract Management Guide. Executed, renewed, or amended on or before August 31, 2015.	AC	4			AC= Expiration or termination of the instrument according to its terms.		See related RSIN 5.3.007a/b/c for bid documentation. See RSIN 5.2.028 for building construction contracts. See RSIN 5.1.017 for contract logs. SB20 (84th Leg.)	



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CONT1	5.1.001a	Contracts, Agreements and Leases executed, renewed or amended on or after September 1st, 2015	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, successful and unsuccessful bids, performance bonds, contracts, purchase orders, inspection reports, and correspondence. May also include other applicable documentation in the master contract file per Texas Comptroller of Public Accounts Contract Management Guide. Executed, renewed, or amended on or after September 1, 2015.	AC	7			AC= expiration or termination of the instrument according to its terms		See related RSIN 5.3.007a/b/c for bid documentation. See RSIN 5.2.028 for building construction contracts. See RSIN 5.1.017 for contract logs.	SB20 (84th Leg.)
CONT2	5.2.028	Construction and Inspection, Surety Bonds Contracts, Buildings		LA	10						
CONT3	5.2	Deed Records		LA	10						





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CONT5	4.7	Non-Federal Grant Records	This series documents grants and contracts from private foundations or non-federal government agencies awarded to faculty, staff and graduate assistants. Information includes name of project, award notification, contract number, and other related information	AC	3			AC= Satisfaction of the grant according to its terms		URRS-77 Circular A-110 is issued under the authority of 31U.S.C. 503 (the Chief Financial Officers Act), 31U.S.C. 1111, 41U.S.C. 405 (the Office of Federal Procurement Policy Act), Reorganization Plan No. 2 of 1970, and E.O. 11541 ("Prescribing the Duties of the Office of Management and Budget and the Domestic Policy Council in the Executive Office of the President").	
CONT6	4.7.008	Grant Records	This series documents state and federal grant projects participated in or administered by state agencies. It includes grant authorization records, which provide evidence of the award of grants to or by agencies; grant/project financial or performance reports, which are periodic reports of financial activity and/or program performance related to grants received or made by agencies.	AC	3			AC= satisfaction of all Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments (the Common Rule)			



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CONT7	5.1.001b	Contracts, Agreements and Leases executed, renewed or amended on or before August 31st, 2015	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, successful and unsuccessful bids, performance bonds, contracts, purchase orders, inspection reports, and correspondence. May also include other applicable documentation in the master contract file per Texas Comptroller of Public Accounts Contract Management Guide.	AC	4			AC= expiration or termination of the instrument according to its terms			



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CORR1	1.1.007	Administrative Correspondence not Associated with an Identified Records Series	Incoming/outgoing and internal correspondence pertaining to the formulation, planning, implementation, interpretation, modification, or redefinition of the programs, services, or projects of an agency and the administrative regulations, policies, and procedures that govern them		4				O	<p>ARCHIVES NOTE: Only the administrative correspondence of executive staff, board or commission members, division directors and program heads require archival review.</p> <p>CAUTION: This records series should be used only for correspondence that is not included in or directly related to another records series on the University's approved schedule. For example, a memorandum that documents an appropriations request must be retained for the minimum retention period prescribed by RSIN 1.1.004; a letter concerning an audit for that prescribed by RSIN 1.1.002, etc. See also RSIN 1.1.011.</p>	



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CORR2	1.1.008	General Correspondence not Associated with an Identified Records Series	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 the University		2					See comment to RSIN 1.1.007. See also RSIN 1.1.010. CAUTION: This records series should be used only for correspondence that is not included in or directly related to another records series on the University's approved schedule. For example, a memorandum that documents an appropriations request must be retained for the minimum retention period prescribed by RSIN 1.1.004; a letter concerning an audit for that prescribed by RSIN 1.1.002, etc. See also RSIN 1.1.011.	
CREC1		Client Files for Fit Test/Personal Training/Dietitian		FE	3						
CREC2		Fit Test/massage Appointment Scheduling Logs		FE	3						
CREC3		Group Exercise and Intramural Sports Registration Forms		FE	3						
CREC4	5.2	Guest Services Transaction Logs		FE	3						



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CREC5	5.4.001	Incident/misuse Reports		CE	5						29 CFR 1904.33
CREC6		Student Waivers Indemnity Agreements (Campus Recreation)		AC	4			AC= end of activity, event, or program			
CREC7		Membership Application Forms		FE	3						
CREC8		Facility Rental Agreements		AC	2			AC= expiration, cancellation, revocation or denial			
EHS1	5.4.001	Occupational Accident Reports and Associated Documentation	Accident or occupational disease reports (by supervisors and employees) and other associated reports required to be submitted to the State Office of Risk Management (SORM) or its predecessors or maintained internally on accident frequency.	CE	5			AC= date of event		See RSIN 5.4.014a/b for non-employee accidents.	29 CFR 1904.33; 28 TAC 120.1(c).
EHS2	5.4.014a	Accident Reports – Adults	Reports of accidents to adults on university property, at university events, or any other situation in which the university could be party to a lawsuit.	AC	3			AC= Date of report, or if a claim is filed, after settlement or denial of claim, whichever applicable.			



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EHS3	5.4.014b	Accident Reports – Minors	Reports of accidents to minors on state property or in any other situation in which the state agency could be a party to a lawsuit.	AC	3			AC= Date minor reaches the age of majority, or if a claim filed, after settlement or denial, whichever applicable.			
EHS4	3.1.024	Audiometric Examinations		AC	5			AC= term of employment			
EHS5	5.4	Environmental Regulations Records	These records include communications with the Regional Air Pollution Authority (RAPA) which is under the jurisdiction of the Environmental Protection Agency (EPA) of the federal government and also the Texas Commission on Environmental Quality (TCEQ). This series may include but is not limited to: Title V Air Discharge Permits; Air Quality Reports; Waste Water Discharge Permit Applications; Waste Water Discharge Permits; Water Quality Reports; Waste Water Discharge Records; Notices of Violation; Notices of Non-compliance; and related documentation and correspondence.	AC	10			AC= expiration of permit		CAUTION: For records pertaining to radiation regulation, please see other series on this schedule. This series documents institutional compliance with environmental laws and guidelines of federal, state, or local governments. URRS-90	
EHS6	5.4	Film Badges Dosimetry Reports		PM							



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EHS7	5.4.003	Fire and Safety Inspection Records		AC	3			AC= inspection or correction			
EHS8	5.4.003	Campus Fire Statistics - Annual Fire Safety Report		PM					I	URRS-222	34 CFR 668.49
EHS9	5.4.015	Hazardous Materials – Administrative Records	This series documents a building by building survey and plan to correct asbestos material hazards. This series may include but is not limited to: surveys; monitoring tests and reports; data forms; building plans; correction checklists; removal job records; and related documentation and correspondence. Environmental, biological, and material safety monitoring reports concerning toxic substances and harmful physical agents in the workplace, including analyses derived from such reports.	AC	30			AC= Date of project completion.		See RSIN 5.4.016a/b for hazardous material exposure records.	29 CFR 1910.1001; 29 CFR 1910.1020(d)(ii); 25 TAC 295.62(a).
EHS11	5.4	Campus Fire Statistics – Fire Statistics	Statistics on number of fires, number of injuries and deaths, and property damage for each on-campus student housing facility		3					URRS-221	34 CFR 668.49



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EHS12	5.4	Campus Fire Statistics - Fire Log / HEOA (Higher Education Opportunity Act) Campus Fire Log	A written, easily understood fire log that records the nature, date, time and general location of fires occurring in on-campus student housing facilities. The Fire Log can be combined with the Crime Log for Clery Act reporting purposes.		7					URRS-220	34 CFR 668.49 20 USC 1092(f)
EHS13	5.4	Leak Testing of Sealed Sources			5						
EHS14	5.4	Manifests of Hazardous Waste Disposal		AC	3			AC= disposal of waste			
EHS15	5.4	Manifests of Medical Waste		AC	3			AC= disposal of waste			
EHS16	5.4	Manifests of Universal Waste		AC	3			AC= disposal of waste			
EHS17	5.4	Radioactive Material License		AC	3			AC= superseded			
EHS18	5.4	Radiation Inventory			3						
EHS19	5.4	Radiation Safety Committee Record	This series documents the establishment of policy and procedure by the committee. Records include: agendas; minutes; reports; notes; working papers and related correspondence		3					URRS-84	Texas Regulations for the Control of Radiation
EHS20	5.4	Receipt, Transfer and Disposal of Lasers		AC				AC= expiration or cancellation			





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EHS21	5.4	Certificate of Laser Registration		AC				AC= termination of license			
EHS22	5.4	Certificate of X-Ray Registration		AC				AC= expiration or cancellation			25 TAC 289.227 (s)(1)(B)
EHS23	5.4	Receipt, Transfer and Disposal X-ray		AC				AC= termination of license			
EHS24	5.4	Safety Data Sheets		AC				AC= receipt of updated sheet or hazardous chemical is no longer present			
EHS25	5.4	Survey Meters			3						
EHS26	5.4	Texas Hazard Communications Act Inventory			30						
EHS27	5.4	Waste Water Discharge Permit			3						
EHS28	5.4	Receipt, Transfer & Disposal-Radioactive Material		AC				AC= termination of license			



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EHS29	5.4	State Testing Security Records	Records relating to the security of assessment instruments. Must include signed security oaths, seating charts, bathroom logs, testing rosters (if applicable), secure storage form, inventory and shipping records (including Materials Control Forms, campus packing lists, and documents used to track the transfer of secure materials within and outside the district), and incident reports. Required by Texas Education Agency Test Security Supplement		5						19 TAC §101.3031(d)
EHS30	5.4	Fire Alarm and Drill Records	This series documents response to any alarm that is activated on campus. This series may include but is not limited to the following information: when and where the incident occurred; specific response; reset time; and rewind time, if appropriate		3					URRS-229	
EHS31	5.6.004	Driver's License Checks		AC				AC= superseded or terminated			
EHS32	16.1.020	Laboratory Inspection Records - Calibration	This series documents in-house inspection of laboratory equipment on a quarterly basis. This series comprises calibration records.		3					URRS-195	25 TAC 289.202(n)(1), 42 CFR 493.1105



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EHS33	5.4	Alcoholic Beverage Control Records	This series is used to provide a record of annual and temporary event licensing for dispensing and serving alcoholic beverages. This series may include but is not limited to: alcohol use requests or waivers, applications for event licenses or permits, and related documentation and correspondence. Does not include Texas Alcoholic Beverage Commission (TABC) certificates required of servers	AC	3			AC= date of event		URRS-241	
EH34	5.4.016a	Hazardous Materials – Employee Exposure Records	Environmental, biological, and material safety monitoring reports, including health or physical examination reports or certificates of employees, who have experienced exposure to toxic substances, harmful physical agent, or bloodborne pathogens in the workplace, including analyses derived from such reports.	AC	30			AC= Termination of employment.			29 CFR 1910.1020(d); 29 CFR 1910.1001; 29 CFR 1910.1020(d)(1)(ii).



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EH35	5.4.016b	Hazardous Materials – Periodic Monitoring	Environmental, biological, and material safety monitoring reports, including health or physical examination reports or certificates of employees, for whom periodic monitoring of health or fitness is required concerning toxic substances, harmful physical agent, or bloodborne pathogens in the workplace, including analyses derived from such reports.	US	2						29 CFR 1910.1020(d); 29 CFR 1910.1001; 29 CFR 1910.1020(d)(1)(ii).
EMERG1	16.3.020	Emergency Protective Orders - Issued by magistrate pursuant to Family Code Ch. 85..		AC	2			AC= order was issued or end of period that the order is effective whichever is later		URRS-514	Family Code, Section 85.025



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EMERG2	5.4.002	Campus Notifications	Emergency notifications distributed to the campus community regarding emergencies, evacuations, "timely warnings" related to public safety, and weather related instructions. Typical situations may include shelter in place directives, building evacuations, areas to avoid because of dangerous conditions, descriptions of suspects wanted in connection with criminal activities, notices of natural gas leaks, etc. Notifications may be sent via e-mail, text message, or other method.		7						Note: emergency notifications may be rolled up into statistics for Clery Act reporting. URRS-394	34 CFR §668.46 20 USC §1092(f)
EMERG3	5.4.017	Disaster Response and Recovery Records	This series documents the events and damages to institutional property due to storms, riots, fires, droughts, floods, and other events affecting citizens and facilities within the jurisdiction of the institution. This series may include but is not limited to: diaries; logs; reports; photographs; notes which indicate or document what happened, when, and where; and related documentation and correspondence.		5				O		See RSIN 5.4.013 for Continuity of Operations Plans (COOP). CAUTION: If grant monies are received to assist with the response or recovery, the retention requirements for this series may vary depending on the specific funding agency.	



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EMERG4	5.4	Clery Table Top Exercises			3						
ENDOW1	1.1.067	Building Naming Inventory Report	A list of building names approved by the Board of Regents that are eligible to be renamed pursuant to Regent Rule 60101.	FE	10				O	See RSIN 1.1.065 for raw data used to produce reports. ARCHIVES NOTE: Reports are archival when they deal with significant aspects of the agency's programs. For agencies that have had an archival appraisal, separate this records series by each type of archival coding, A, R, or E.	
ENDOW2		Daily Gift Log Reports and Gift Records Daily Batch Files		FE	5						
ENDOW3	13.2.001	Donor Files	Includes individual donor and prospective donor files. URRS-344	AC				AC= when prospect ceases to be viable	I	CAUTION: The name or other identifying information about a donor may be withheld from public disclosure under the Public Information Act. Government Code Sec.552.1235	
ENDOW4		Endowment Compliance Reports		FE	10						



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ENDOW5	13.2.002	Fundraising Records	This series documents institutional efforts to raise funds to support program functions and facilities. This series may include but is not limited to: requests for fund- raising; gift history reports; background on previous donations; pledges; and related documentation and correspondence		7						CAUTION: Does not include financial records
ENDOW6		Voluntary Support of Education Reports		PM							
ENDOW7	13.2.004	Gift Records to a Department or Program	This series documents potential or realized private, corporate, or public agency funding to a department or program, including endowments, trusts, and funds raised by support/"friends" groups. This series comprises award guidelines, memoranda of understanding, records of fund disbursements, and related documentation and correspondence		7						CAUTION: For records of major gifts, see URRS 13.2.005 (Gift Records - Institutional). For donor files, see URRS 13.2.001 (Donor Files). For ongoing contracts and agreements, see RRS 5.1.001.



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ENDOW8	13.2.005	Gift Records to the University	This series documents potential or realized private, corporate, or public agency funding to the institution, including endowments and trusts. This series includes letters and agreements of gift, copies of bequest instruments and wills from individuals or estates, and related documentation and correspondence	PM					I	CAUTION: The name or other identifying information about a donor may be withheld from public disclosure under the Public Information Act. Government Code Sec.552.1235URRS-76 .	
ENDOW9	13.2.003	Gift Records – Class and Alumni	This series provides a record of gifts given to the institution by graduating or alumni classes. This series may include but is not limited to: gift lists; gift histories; a record of gift placement arrangements; and related documentation and correspondence		5				I	See URRS 13.2.005 for records documenting potential or realized funding to the institution such as endowments and trusts.	
ENDOW10		Development Board Bylaws		AC	3			AC= obsolete			





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EVENT1	11.1.006	Event Administration Records - Routine	This series documents facilities, services and other accommodations provided by the institution for events. Records may include: facilities reservation agreements; room reservation lists; customer and room occupancy lists; catering services orders; customer evaluations; summary reports; and related correspondence.	AC	1			AC= completion of event		CAUTION: Use this record series in conjunction with RRS Section 4.1 for financial records, RRS 5.1.001 for written agreements or contracts, and RRS Section 5.3 for purchasing records. See URRS 11.1.007 for records of special events.	



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EVENT2	11.1.007	Event Administration Records - University Special Events	This series documents the efforts of a college or unit to provide informative sessions, short-courses, workshops, training programs, excursions, and celebratory events for members of the institution and the communities it serves. This series may include but is not limited to: materials on planning and arrangements; reports; promotional and publicity materials; press releases and news clippings; photographs; presentation materials and handouts; schedules of speakers and activities; registration and attendance lists; participant evaluations; and related documentation and correspondence	AC	4			AC= completion of event	O	URRS-42	
EVENT3	16.4.002	Menus	This series is used to provide a record of approved menus in each food service location. It is also used for cost planning and ordering of food and supplies.	AV						URRS-242	
FA37		Sponsored Student Files		FE	3						



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FA1	15.2.034	Veterans' Records	This series documents the entitlement status and enrollment of veterans in the institution. Records include but are not limited to: individual veteran student records that certify to the U.S. Department of Veterans Affairs that the student is eligible for educational benefits, is currently enrolled at the institution in a qualifying curriculum, and is maintaining standards required to receive entitlements; veterans attendance reports; and related forms, documentation and correspondence	AC	3			AC= graduation or last date of attendance		See URRS 15.2.017 for Hazlewood Act documentation and URRS 15.2.033 for records of U.S. Department of Veterans Affairs certification.	38 CFR 21.4209.



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FA2	15.3.002	Financial Aid Application and Award Records – All Local Grant, Scholarship, Loan, or Work Study Programs	Including (to the extent applicable to specific programs): applications; financial aid need analysis and eligibility forms; financial aid transcripts; selective service registration compliance statements and any supporting documentation; statements of educational purpose; anti-drug abuse statements; Student Aid Report (SAR) or Institutional Student Information Report (ISIR); authorization and award forms; copies of documents submitted by students or parents for verification of student aid application information; and similar records relating to the application for and award of grants, scholarships, loans, veterans education benefits, or opportunities to participate in work-study programs. Includes records of recipients of all local grants, scholarships, loans, or work-study	AC	3			AC= end of award period		URRS-369	



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					Years	Months	Days				
FA3	15.3.004	Financial Aid Application and Award Records – All Other Federal or State Grant, Scholarship, and Work-Study Programs	Including (to the extent applicable to specific programs): applications; financial aid need analysis and eligibility forms; financial aid transcripts; selective service registration compliance statements and any supporting documentation; statements of educational purpose; anti-drug abuse statements; Student Aid Report (SAR) or Institutional Student Information Report (ISIR); authorization and award forms; copies of documents submitted by students or parents for verification of student aid application information; and similar records relating to the application for and award of grants, scholarships, loans, veterans education benefits, or opportunities to participate in work-study programs .Includes records of recipients of all other federal or state grant, scholarship, and work-study programs	AC	5			AC= end of award year		URRS-367	



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FA4	15.3.003	Financial Aid Application and Award Records – All Other Federal or State Loan Programs	Including (to the extent applicable to specific programs): applications; financial aid need analysis and eligibility forms; financial aid transcripts; selective service registration compliance statements and any supporting documentation; statements of educational purpose; anti-drug abuse statements; Student Aid Report (SAR) or Institutional Student Information Report (ISIR); authorization and award forms; copies of documents submitted by students or parents for verification of student aid application information; and similar records relating to the application for and award of grants, scholarships, loans, veterans education benefits, or opportunities to participate in work-study programs. Includes records of recipients of all other federal or state loans.	AC	5			AC= end of period for which the loan was intended		URRS-368	



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FA5	15.2.017	Hazelwood Act Documentation	This series documents eligibility to claim the Hazelwood exemption and institutional records to track benefit hours claimed. 19 TAC 21.85 for loans made before fall 1971 19 TAC 21.54 for loans after fall 1971	PM						See URRS 15.2.033 for Veterans Affairs Certification Records and URRS 15.2.034 for all other records pertaining to the entitlement status and enrollment of veterans in the institution.	19 TAC 21.85 for loans made before fall 1971 19 TAC 21.54 for loans after fall 1971.
FA6	15.2.018	Hazelwood Act Documentation - Non-awarded Applicants	This series documents eligibility to claim the Hazelwood exemption and institutional records to track benefit hours claimed	AC	2			AC= date loan denied		See URRS 15.2.033 for Veterans Affairs Certification Records and URRS 15.2.034 for all other records pertaining to the entitlement status and enrollment of veterans in the institution.	Texas Education Code §54.241 (Hazelwood Act), 19 TAC 21.85



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Archival Codes (Field 10)

A/I – Transfer to State/University Archivist  
 R/O – Review by State/University Archivist

1. Agency Code: 714		2. Agency Name: UT at Arlington									
3. Agency Item No.	4. Record Series	5. Record Series Title	6. Description	7. Ret. Code	8.			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
FA7	15.3.005	Financial Aid Application and Award Records – Health Profession and Nursing Student Loan Programs	Including (to the extent applicable to specific programs): applications; financial aid need analysis and eligibility forms; financial aid transcripts; selective service registration compliance statements and any supporting documentation; statements of educational purpose; anti-drug abuse statements; Student Aid Report (SAR) or Institutional Student Information Report (ISIR); authorization and award forms; copies of documents submitted by students or parents for verification of student aid application information; and similar records relating to the application for and award of grants, scholarships, loans, veterans education benefits, or opportunities to participate in work-study programs. Includes records of recipients of health profession and nursing student loan programs, including the Health Education Assistance Loan (HEAL) Program	AC	5			AC= termination of enrollment as a full time student		URRS-365	42 CFR 57.215(b), 57.315(a)(2), and 60.56(b).





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Retention Codes (field 7)

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Archival Codes (Field 10)

A/I – Transfer to State/University Archivist  
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1. Agency Code: 714		2. Agency Name: UT at Arlington									
3. Agency Item No.	4. Record Series	5. Record Series Title	6. Description	7. Ret. Code	8.			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
FA8	15.3.006	Financial Aid Application and Award Records - Income Contingent Loan (ICL), Perkins Loan, Federal Work-Study, Federal Supplemental Educational Opportunity Grant (FSEOG) Programs	(to the extent applicable to specific programs): applications; financial aid need analysis and eligibility forms; financial aid transcripts; selective service registration compliance statements and any supporting documentation; statements of educational purpose; anti-drug abuse statements; Student Aid Report (SAR) or Institutional Student Information Report (ISIR); authorization and award forms; copies of documents submitted by students or parents for verification of student aid application information; and similar records relating to the application for and award of grants, scholarships, loans, veterans education benefits, or opportunities to participate in work-study programs. Includes records of recipients of Income Contingent Loan (ICL), Perkins Loan, Federal Work-Study (FWS), and Federal Supplemental Educational Opportunity Grant (FSEOG) Programs.	AC	3			AC= submission of annual report		URRS-362.	34 CFR 668.24, 674.19(e)(3), 675.19(b)(1), and 676.19(b).



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Archival Codes (Field 10)

A/I – Transfer to State/University Archivist  
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1. Agency Code: 714		2. Agency Name: UT at Arlington									
3. Agency Item No.	4. Record Series	5. Record Series Title	6. Description	7. Ret. Code	8.			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
FA9	15.3.007	Financial Aid Application and Award Records – Non-awarded	Including (to the extent applicable to specific programs): applications; financial aid need analysis and eligibility forms; financial aid transcripts; selective service registration compliance statements and any supporting documentation; statements of educational purpose; anti-drug abuse statements; Student Aid Report (SAR) or Institutional Student Information Report (ISIR); authorization and award forms; copies of documents submitted by students or parents for verification of student aid application information; and similar records relating to the application for and award of grants, scholarships, loans, veterans education benefits, or opportunities to participate in work-study programs. Includes records of those who applied for but did not receive financial aid	AC	1			AC= end of academic period for which aid is denied		URRS-370	



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1. Agency Code: 714		2. Agency Name: UT at Arlington									
3. Agency Item No.	4. Record Series	5. Record Series Title	6. Description	7. Ret. Code	8.			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
FA10	15.3.008	Financial Aid Application and Award Records – Pell Grant program	Including (to the extent applicable to specific programs): applications; financial aid need analysis and eligibility forms; financial aid transcripts; selective service registration compliance statements and any supporting documentation; statements of educational purpose; anti-drug abuse statements; Student Aid Report (SAR) or Institutional Student Information Report (ISIR); authorization and award forms; copies of documents submitted by students or parents for verification of student aid application information; and similar records relating to the application for and award of grants, scholarships, loans, veterans education benefits, or opportunities to participate in work-study programs. Includes records of recipients of Pell Grants	AC	5			AC= end of award year		URRS-363	34 CFR 690.82(a)



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Archival Codes (Field 10)

A/I – Transfer to State/University Archivist  
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1. Agency Code: 714		2. Agency Name: UT at Arlington									
3. Agency Item No.	4. Record Series	5. Record Series Title	6. Description	7. Ret. Code	8.			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
FA11	15.3.009	Financial Aid Application and Award Records – Stafford and PLUS Programs .	Including (to the extent applicable to specific programs): applications; financial aid need analysis and eligibility forms; financial aid transcripts; selective service registration compliance statements and any supporting documentation; statements of educational purpose; anti-drug abuse statements; Student Aid Report (SAR) or Institutional Student Information Report (ISIR); authorization and award forms; copies of documents submitted by students or parents for verification of student aid application information; and similar records relating to the application for and award of grants, scholarships, loans, veterans education benefits, or opportunities to participate in work-study programs. Includes records of recipients of Stafford loans (formerly Guaranteed Student Loans) and PLUS Program loans	AC	3			AC= end of loan period		URRS-364	34 CFR 682.610(a)(2), 34 CFR 668.24



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Archival Codes (Field 10)

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1. Agency Code: 714		2. Agency Name: UT at Arlington									
3. Agency Item No.	4. Record Series	5. Record Series Title	6. Description	7. Ret. Code	8.			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
FA12	15.3.010	Financial Aid Application and Award Records – Veterans Administration Education Assistance Allowances	Including (to the extent applicable to specific programs): applications; financial aid need analysis and eligibility forms; financial aid transcripts; selective service registration compliance statements and any supporting documentation; statements of educational purpose; anti-drug abuse statements; Student Aid Report (SAR) or Institutional Student Information Report (ISIR); authorization and award forms; copies of documents submitted by students or parents for verification of student aid application information; and similar records relating to the application for and award of grants, scholarships, loans, veterans education benefits, or opportunities to participate in work-study programs. Includes records of recipients of Veterans Administration educational assistance allowances	AC	3			AC= termination of enrollment		URRS-366	38 CFR 21.4209(f).



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Archival Codes (Field 10)

A/I – Transfer to State/University Archivist  
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1. Agency Code: 714		2. Agency Name: UT at Arlington									
3. Agency Item No.	4. Record Series	5. Record Series Title	6. Description	7. Ret. Code	8.			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
FA13	15.3.014	Financial Aid Disbursement and Repayment Records - All Other Federal or State Grant, Scholarship, or Work-Study Programs	Includes (to the extent applicable to specific programs) disbursement and repayment forms; receipts; account cards; copies of promissory notes; certifications of enrollment status or other data to grantors or lenders; cancellation, deferment, or payment extension documentation; work-study certifications and time reports; documentation of entrance and exit interviews; records of contacts concerning overdue loans; correspondence between the junior college and the borrower, collection agencies, and credit bureaus; and similar records relating to the disbursement of grants, veterans education benefits, and work-study funds and the disbursement and repayment of loans. Includes disbursement and repayment records of all other federal or state grant, scholarship, or work-study programs	AC	5			AC= end of award year		URRS-378	



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Archival Codes (Field 10)

A/I – Transfer to State/University Archivist  
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1. Agency Code: 714		2. Agency Name: UT at Arlington									
3. Agency Item No.	4. Record Series	5. Record Series Title	6. Description	7. Ret. Code	8.			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
FA14	15.3.011	Financial Aid Disbursement and Repayment Records – All Other Federal or State Loan Programs	Includes (to the extent applicable to specific programs) disbursement and repayment forms; receipts; account cards; copies of promissory notes; certifications of enrollment status or other data to grantors or lenders; cancellation, deferment, or payment extension documentation; work-study certifications and time reports; documentation of entrance and exit interviews; records of contacts concerning overdue loans; correspondence between the university and the borrower, collection agencies, and credit bureaus; and similar records relating to the disbursement of grants, veterans education benefits, and work-study funds and the disbursement and repayment of loans. Includes disbursement and repayment records of all other federal or state loan programs whose funds are administered by agencies other than the university. End of the period for which the loan was intended + 5 yrs. Including (to the extent applicable to specific programs) disbursement and repayment forms; receipts; account cards; copies of promissory notes; certifications of	AC	3			AC= date of final repayment or cancellation		URRS-382	



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Archival Codes (Field 10)

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1. Agency Code: 714		2. Agency Name: UT at Arlington									
3. Agency Item No.	4. Record Series	5. Record Series Title	6. Description	7. Ret. Code	8.			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
FA15	15.3.013	Financial Aid Disbursement and Repayment Records – All Other University Administered Federal or State Loan Programs	Includes (to the extent applicable to specific programs) disbursement and repayment forms; receipts; account cards; copies of promissory notes; certifications of enrollment status or other data to grantors or lenders; cancellation, deferment, or payment extension documentation; work-study certifications and time reports; documentation of entrance and exit interviews; records of contacts concerning overdue loans; correspondence between the university and the borrower, collection agencies, and credit bureaus; and similar records relating to the disbursement of grants, veterans education benefits, and work-study funds and the disbursement and repayment of loans. Includes disbursement and repayment records of all other federal or state loan programs whose funds are administered by the university	AC	5			AC= date of final repayment or cancellation		URRS-380	





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Archival Codes (Field 10)

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1. Agency Code: 714		2. Agency Name: UT at Arlington									
3. Agency Item No.	4. Record Series	5. Record Series Title	6. Description	7. Ret. Code	8.			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
FA16	15.3.021	Financial Aid Disbursement and Repayment Records - Federal Work-Study (FWS) and Federal Supplemental Educational Opportunity Grant (FSEOG) Programs.	Includes (to the extent applicable to specific programs) disbursement and repayment forms; receipts; account cards; copies of promissory notes; certifications of enrollment status or other data to grantors or lenders; cancellation, deferment, or payment extension documentation; work-study certifications and time reports; documentation of entrance and exit interviews; records of contacts concerning overdue loans; correspondence between the university and the borrower, collection agencies, and credit bureaus; and similar records relating to the disbursement of grants, veterans education benefits, and work-study funds and the disbursement and repayment of loans. Includes disbursement and repayment records of Federal Work-Study (FWS) and Federal Supplemental Educational Opportunity Grant (FSEOG) Programs.	AC	3			AC= submission of annual report for the award year		URRS-372	



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Archival Codes (Field 10)

A/I – Transfer to State/University Archivist  
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1. Agency Code: 714		2. Agency Name: UT at Arlington									
3. Agency Item No.	4. Record Series	5. Record Series Title	6. Description	7. Ret. Code	8.			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
FA17	15.3.017	Financial Aid Disbursement and Repayment Records - Health Education Assistance Loan (HEAL) Program	Includes (to the extent applicable to specific programs) disbursement and repayment forms; receipts; account cards; copies of promissory notes; certifications of enrollment status or other data to grantors or lenders; cancellation, deferment, or payment extension documentation; work-study certifications and time reports; documentation of entrance and exit interviews; records of contacts concerning overdue loans; correspondence between the university and the borrower, collection agencies, and credit bureaus; and similar records relating to the disbursement of grants, veterans education benefits, and work-study funds and the disbursement and repayment of loans.. Includes disbursement and repayment records of Health Education Assistance Loan (HEAL) Program	AC	5			AC= termination of enrollment as a full time student		URRS-376	. 42 CFR 60.56(b) 66



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Archival Codes (Field 10)

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1. Agency Code: 714		2. Agency Name: UT at Arlington									
3. Agency Item No.	4. Record Series	5. Record Series Title	6. Description	7. Ret. Code	8.			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
FA18	15.3.018	Financial Aid Disbursement and Repayment Records – Health Profession and Nursing Student Loan Programs	Includes (to the extent applicable to specific programs) disbursement and repayment forms; receipts; account cards; copies of promissory notes; certifications of enrollment status or other data to grantors or lenders; cancellation, deferment, or payment extension documentation; work-study certifications and time reports; documentation of entrance and exit interviews; records of contacts concerning overdue loans; correspondence between the university and the borrower, collection agencies, and credit bureaus; and similar records relating to the disbursement of grants, veterans education benefits, and work-study funds and the disbursement and repayment of loans. Includes disbursement and repayment records of health profession and nursing student loan programs [excluding the Health Education Assistance Loan (HEAL) Program	AC	5			AC= date the loan is retired		URRS-375	42 CFR 57.215(c) and 57.315(a)(3)



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1. Agency Code: 714		2. Agency Name: UT at Arlington									
3. Agency Item No.	4. Record Series	5. Record Series Title	6. Description	7. Ret. Code	8.			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
FA19	15.3.022	Financial Aid Disbursement and Repayment Records - Income Contingent Loan (ICL) and Perkins Loan Programs	Includes (to the extent applicable to specific programs) disbursement and repayment forms; receipts; account cards; copies of promissory notes; certifications of enrollment status or other data to grantors or lenders; cancellation, deferment, or payment extension documentation; work-study certifications and time reports; documentation of entrance and exit interviews; records of contacts concerning overdue loans; correspondence between the university and the borrower, collection agencies, and credit bureaus; and similar records relating to the disbursement of grants, veterans education benefits, and work-study funds and the disbursement and repayment of loans. Includes disbursement and repayment records of Income Contingent Loan (ICL) and Perkins Loan Programs.	AC	5			AC= date of final repayment or cancellation		URRS-371	34 CFR 674.19(e)(3)



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1. Agency Code: 714		2. Agency Name: UT at Arlington									
3. Agency Item No.	4. Record Series	5. Record Series Title	6. Description	7. Ret. Code	8.			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
FA20	15.3.012	Financial Aid Disbursement and Repayment Records – Institutionally Funded Loan Programs	Includes (to the extent applicable to specific programs) disbursement and repayment forms; receipts; account cards; copies of promissory notes; certifications of enrollment status or other data to grantors or lenders; cancellation, deferment, or payment extension documentation; work-study certifications and time reports; documentation of entrance and exit interviews; records of contacts concerning overdue loans; correspondence between the university and the borrower, collection agencies, and credit bureaus; and similar records relating to the disbursement of grants, veterans education benefits, and work-study funds and the disbursement and repayment of loans. Includes disbursement and repayment records of institutionally-funded loan programs	AC	3			AC= date of final repayment or cancellation		. URRS-381	



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1. Agency Code: 714		2. Agency Name: UT at Arlington									
3. Agency Item No.	4. Record Series	5. Record Series Title	6. Description	7. Ret. Code	8.			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
FA21	15.3.014	Financial Aid Disbursement and Repayment Records – Local Grant, Scholarship or Work-Study Programs	Includes (to the extent applicable to specific programs) disbursement and repayment forms; receipts; account cards; copies of promissory notes; certifications of enrollment status or other data to grantors or lenders; cancellation, deferment, or payment extension documentation; work-study certifications and time reports; documentation of entrance and exit interviews; records of contacts concerning overdue loans; correspondence between the university and the borrower, collection agencies, and credit bureaus; and similar records relating to the disbursement of grants, veterans education benefits, and work-study funds and the disbursement and repayment of loans. Includes disbursement and repayment records of local grant, scholarship, or work-study programs	AC	3			AC=end of award year		URRS-379	



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1. Agency Code: 714		2. Agency Name: UT at Arlington									
3. Agency Item No.	4. Record Series	5. Record Series Title	6. Description	7. Ret. Code	8.			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
FA22	15.3.020	Financial Aid Disbursement and Repayment Records - Pell Grant Program	Includes (to the extent applicable to specific programs) disbursement and repayment forms; receipts; account cards; copies of promissory notes; certifications of enrollment status or other data to grantors or lenders; cancellation, deferment, or payment extension documentation; work-study certifications and time reports; documentation of entrance and exit interviews; records of contacts concerning overdue loans; correspondence between the university and the borrower, collection agencies, and credit bureaus; and similar records relating to the disbursement of grants, veterans education benefits, and work-study funds and the disbursement and repayment of loans. Includes disbursement and repayment records of Pell Grant Program	AC	3			AC= end of award year		URRS-373	34 CFR 690.82(a), 34 CFR 668.24



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1. Agency Code: 714		2. Agency Name: UT at Arlington									
3. Agency Item No.	4. Record Series	5. Record Series Title	6. Description	7. Ret. Code	8.			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
FA23	15.3.019	Financial Aid Disbursement and Repayment Records - Stafford and PLUS Programs	Includes (to the extent applicable to specific programs) disbursement and repayment forms; receipts; account cards; copies of promissory notes; certifications of enrollment status or other data to grantors or lenders; cancellation, deferment, or payment extension documentation; work-study certifications and time reports; documentation of entrance and exit interviews; records of contacts concerning overdue loans; correspondence between the university and the borrower, collection agencies, and credit bureaus; and similar records relating to the disbursement of grants, veterans education benefits, and work-study funds and the disbursement and repayment of loans. .Includes disbursement and repayment records of Stafford (formerly Guaranteed Student Loan) and PLUS Programs	AC	5			AC= end of loan period		URRS-374	34 CFR 682.610(a)(2)





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3. Agency Item No.	4. Record Series	5. Record Series Title	6. Description	7. Ret. Code	8.			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
FA24	15.3.016	Financial Aid Disbursement and Repayment Records - Veterans Administration Educational Assistance Allowances	Including (to the extent applicable to specific programs) disbursement and repayment forms; receipts; account cards; copies of promissory notes; certifications of enrollment status or other data to grantors or lenders; cancellation, deferment, or payment extension documentation; work-study certifications and time reports; documentation of entrance and exit interviews; records of contacts concerning overdue loans; correspondence between the junior college and the borrower, collection agencies, and credit bureaus; and similar records relating to the disbursement of grants, veterans education benefits, and work-study funds and the disbursement and repayment of loans. Includes disbursement and repayment records of Veterans Administration educational assistance allowances	AC	3			AC= termination of enrollment		URRS-377	38 CFR 21.4209(f)



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1. Agency Code: 714		2. Agency Name: UT at Arlington									
3. Agency Item No.	4. Record Series	5. Record Series Title	6. Description	7. Ret. Code	8.			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
FA25	15.03.02	Financial Aid Program - Fiscal Operations Report (FISAP)	Includes the Fiscal Operations Report and Application to Participate in the Federal Perkins Loan, Federal Supplemental Educational Opportunity Grant (FSEOG), and Federal Work-Study (FWS) Programs (FISAP) and any records necessary to support the data contained in the FISAP 34 CFR 668.24(e)(1)(i) for Federal Title IV, 674.19(e)(3)(i) for Federal Perkins Loan, 675.19(b)(1) for Federal Work Study (FWS), and 676.19(b) for Federal Supplemental Educational Opportunity Grant (FSEOG)	AC	3			AC= end of reporting year		URRS-141	34 CFR 668.24(e)(1)(i), 324 CFR 674.19(e)(3)(i), 34 CFR 675.19(b)(1), 34 CFR 676.19(b).
FA26	15.3.024	Financial Aid Program - Health Profession and Nursing Student Loan Administration Records	Records documenting the fiscal administration by a university of a health profession or nursing student loan.	AC	3			AC= submission of periodic report		URRS-385	45 CFR 74.53(b).



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FA27	15.3.025	Financial Aid Program - Institutional Program Files	Documentation of the university's participation in financial aid programs (such as Federal Title IV). Required records include: Program Participation Agreements; application portion of the FISAP; accrediting and licensing agency reviews, approvals, reports; state agency reports; audit and program review reports; self-evaluation reports; other records pertaining to financial responsibility and standards of administrative capacity 34 CFR 668.24 for Title IV and HEA, 34 CFR 674.19(e)(3)(i) for Federal Perkins Loan, 34 CFR 675.19(b)(1) for Federal Work-Study (FWS), 34 CFR 690.82(a) for Federal Pell Grant, and 34 CFR 676.19(b) for Federal Supplemental Educational Opportunity Grant (FSEOG)	AC	3			AC = End of award year.		URRS-149	
FA29	15.3.022	Perkins Loan Annual Report		AC	5			AC = Date of final repayment or cancellation.		See URRS 15.3.026 for Perkins Original Promissory Notes.	34 CFR 674.19(e)
FA30	15.3.026	Perkins Original Promissory Notes		AC				AC = Until loan is satisfied or documents are needed to enforce obligation.			34 CFR 674.19(e)



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FA31	15.3.022	Perkins Loan Report	Monthly balancing	AC	5			AC = Date of final repayment or cancellation.		See URRS 15.3.026 for Perkins Original Promissory Notes.	34 CFR 674.19(e)
FA32		Scholarship Applications	Applications for any university scholarships which require a separate application outside the FAFSA or financial aid application process.	AC	3			AC= audit			
FA33		Scholarship Contracts		AC	10			AC= expiration or termination			
FA34	4.1.001	Scholarship Expenditure Ledger	Records depicting the disbursement of scholarship dollars.	FE	3						
FA35		Scholarship Information		FE	3						
FA36		SEOG Pell Reports		FE	3						
FA38		Application to File Documents (Financial Aid)		AC	3			AC=graduated or last attended			
FA39		Financial Aid Documents	Any files related to financial student aid which does not fall within another schedule and required to be maintained for any federal program.	AC	5			AC= Department of Education acceptance of annual report			
FA40		National Direct Student Loan (NDSL) Student Loan Records		AC	3			AC = Loan paid in full			
FA41		Institutional Student Loans		AC				AC= loan paid in full		JC schedule JC3750-01a(8)	



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FAC1		Outside Employment Requests and Authorizations		AC	2			AC= term of employment		URRS-504	
FAC2	17.1.018	Student Faculty/Course Evaluation Records - Non Tenure-Track Faculty	This series documents students' evaluations of non-tenure track teaching personnel and is used to help determine faculty promotion, merit increases and/or to review instructional courses and programs. These records provide students' opinions on faculty members' familiarity with current literature of the discipline, preparation, assignments, examinations, lecture styles, willingness to engage in dialogue, and availability. Records include: bubble forms (input documents); course reaction inventory printouts; statistical tabulations; summary reports; and related documentation and correspondence	AC	3			AC= course completion		URRS-507.	



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FAC3	17.1.019	Student Faculty/Course Evaluation Records - Tenure Track Faculty	This series documents students' evaluations of tenure-track teaching personnel and is used to help determine faculty tenure, promotion, merit increases and/or to review instructional courses and programs. These records provide students' opinions on faculty members' familiarity with current literature of the discipline, preparation, assignments, examinations, lecture styles, willingness to engage in dialogue, and availability. Records include: bubble forms (input documents); course reaction inventory printouts; statistical tabulations; summary reports; and related documentation and correspondence		7						Retention period should be longer if a university's tenure review cycle is longer than 7 years. URRS-258	
FAC4	12.1.001	Faculty Appointment, Promotion and Tenure Records	Evaluations, recommendations, and similar documentation relating to the review process for promotion and tenure for all faculty or staff in the tenure track	AC	5			AC= term of employment		URRS-57	CFR 1602.49	
FAC5		Faculty/Administrative Offer Letter Packages		AC	5			AC= term of employment				



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FAC6		Changes in Faculty Status		AC	5			AC= term of employment			
FAC7		Professor Emeritus Nominations		AC	5			AC= term of employment			
FAC8	18.3.001	Faculty Election Records	This series documents elections held by various faculty organizations. This series may include but is not limited to: ballots; tabulations; and related documentation	AC				AC= until results are verified		URRS-338	
FAC9		Faculty Meeting Minutes			1				O		
FAC10		Faculty Search Records			2						
FAC11	3.4.002	Full Time Faculty Leave of Absence Requests		FE	3						
FACIL1	1.1.056	ADA Americans with Disabilities Act Documentation	Self- evaluations and plans documenting compliance with the requirements of the Americans with Disabilities Act.		3				O		1.1.056 28 CFR 35.105( 3)



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FACIL2	5.4.015	Asbestos Records – Administrative	This series documents a building by building survey and plan to correct asbestos material hazards. This series may include but is not limited to: surveys; monitoring tests and reports; data forms; building plans; correction checklists; removal job records; and related documentation and correspondence. Environmental, biological, and material safety monitoring reports concerning toxic substances and harmful physical agents in the workplace, including analyses derived from such reports.	AC	30			AC= Date of project completion.		See RSIN 5.4.016a/b for hazardous material exposure records.	29 CFR 1910.1001, 29 CFR 1910.1020(d) for Inspection Records, 25 TAC 295.62(a).
FACIL3	5.4.003	Boiler Inspection Reports		LA							
FACIL4	5.2.003	Building Blueprints and Specifications (UTA-owned)		LA	2				O		
FACIL5	17.1.015	Space Deficit/Allocation Records	This series includes documents used to determine the university's space deficit for purposes of the legislative allocation of funds to universities.	AC	6			AC= September 1 of odd numbered years		CAUTION: For records relating to the reservation of rooms for classes and events, see RRS 5.2.026. URRS-261	
FACIL6	5.2.027	Application Distribution File Statistical Report - Space allocations	Reports summarizing efficiency of facility space utilization, which may include data on room usage, demand, allocation, and capacity.	AV							





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FACIL7	5.2.003	Blueprints, Plans and Drawings		LA							
FACIL8	5.2.002	Building Construction Files	Planning, design, and construction records; accepted and rejected bids; correspondence; etc.	AC	11			AC= completion of project			
FACIL9	5.2.028	Building Construction Contract and Inspection Records		LA	10				O		
FACIL10	5.2	Energy Management Plan		US							
FACIL11	5.2	Energy Management Usage Records		AV							
FACIL12	5.2.008	Equipment Repair and Maintenance Log	Equipment history file, which may include logbooks and requests for installation, moves, service, repair, etc.	LA	3						
FACIL13	5.1.001a	Equipment Service Agreements executed, renewed, or amended on or after September 1, 2015	Agreements or contracts between the agency and equipment vendor to provide maintenance service for equipment. Includes requests for installation, moves, service, etc.; and service/repair logbooks, etc.	LA	7						Texas Government Code 441.1855



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FACIL14	5.4.012	Key Requests and Issuance Reports	Records relating to the issuance of keys, identification cards, building passes, passwords, signed statements or similar instruments of access to agency or state facilities, equipment or automated systems.	AC	2			AC= superseded, expired or terminated			
FACIL15	5.2.010	Operations and Parts Manual		LA							
FACIL16	5.1	Permits and Licenses	Records documenting the application for and the issuance of permits and licenses by the institution for sales, solicitation, facility usage, and similar activities	AC	2			AC= expiration, cancellation, revocation or denial			
FACIL17	5.2	Physical Plant Procedures		AC	3			AC= termination of procedures			
FACIL18	5.2	Thermal Energy Plant Equipment Logs and Procedures		LA	3						
FACIL19	5.2	Thermal Energy Plant Procedures		AC	3			AC= termination of procedure			



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FACIL20	5.2	Utility Lines Located by the University	This series documents a university utility's marking of underground lines in response to a notification of planned excavation activity, in compliance with Utilities Code Chapter 251 and 16 TAC 18.8. May include notifications from Notification Center regarding details of planned excavation work, proof of marking underground lines, notification to Excavator of intent not to locate, or related documentation or correspondence	AC	2					URRS-497	
FACIL21	5.2	Utility Line Location Requests	Line locate requests, "Call Before You Dig" records, or other similar records documenting a university's request for information regarding location of underground cable or utility lines from a notification center (e.g., Texas811) prior to excavation	AC	2			AC= completion of project		URRS-79	
FACIL22	5.1.001b	Equipment Service Agreements executed, renewed or amended on or before August 31, 2015	Agreements or contracts between the agency and equipment vendor to provide maintenance service for equipment. Includes requests for installation, moves, service, etc.; and service/repair logbooks, etc.	AC	4			AC= Expiration or termination of the instrument according to its terms.			Texas Government Code 441.1855



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GEN1	1.1.075	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			1.1.075 Texas Civil Practice and Remedies Code , Chapter 154.071.
GEN2	3.3	Recruiters' Records (External Entities Job Fairs)	This series provides a record of recruiter visits to the campus to participate in job fairs or conduct job interviews. Records may include but are not limited to: scheduling calendars; recruiter schedules; Affirmative Action statements; recruiter information forms; lists of interviewees; feedback forms from recruiters; and related documentation and correspondence		2					URRS-247	



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GEN3	3.1.037	Award Administration and History Records	This series documents the process of selecting institutional faculty, staff, students and alumni to receive awards, fellowships, and scholarships based on merit or achievement. Includes: eligibility terms and selection criteria, award history and information on funding sources, award notifications, summary lists of winners, and biographies of winners.	AC				AC= termination of award		URRS-47	



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GEN4	3.1.037	Award Selection Records	This series documents the process of selecting institutional faculty, staff, students and alumni to receive awards based on merit or achievement. The series may include but is not limited to: applications; nomination letters; recommendations; transcripts; letters of award notification or denial; letters accepting or declining awards; demonstration of need documentation; vote tallies; ranking sheets; and related documentation and correspondence. CAUTION: This records series documents the process of selecting an individual to receive an award. A record of an employee's receiving an award, incentive, or tenure should be classified under personnel records		2					URRS-48	



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GEN5	1.1.013	Calendars Appointments 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				O	<p>ARCHIVES NOTE: Only the calendars, appointment, and itinerary records of elected officials, executive staff, board or commission members, division directors, and program heads require archival review. Contact the State Archives when these records have met their retention periods.</p> <p>CAUTION: A record of this type purchased with personal funds, but used by a state official or employee to document his or her work activities may be a state record and subject to this retention period. See Open Records Decision 635 issued in December 1995 by the Attorney General.</p>	



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GEN6	1.1	External Committee Participation Records	This series documents the relationship and participation of institution units in external professional and educational associations and other organizations. The unit's role may be one of membership on the advisory or administrative board, participation in a task force or subcommittee, or one of membership in consortia. This series may include but is not limited to: promotional information; rules and regulations; reports; proposals and planning records; workshop and conference records; surveys and questionnaires; minutes; and related documentation and correspondence relationship and participation of institution units in external professional and educational associations and other organizations. The unit's role may be one of membership on the advisory or administrative board, participation in a task force or subcommittee, or one of membership in consortia. This series may include but is not limited to: promotional information; rules and regulations; reports; proposals and planning records; workshop and conference records; surveys	AV						URRS – 24	





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					Years	Months	Days				
GEN7	1.1	Lecture and Lecture Series Records	This series documents the development and history of special lectures and continuing lectureships devoted to a variety of topics and disciplines sponsored by the institution. This series may include but is not limited to: information on funding; financial support and honoraria records; patron information; information on catering arrangements; and related documentation and correspondence	AC	5					URRS-43	
GEN8	1.1.040	Speeches, Papers and Presentations	Notes or text of speeches, papers, presentations or reports delivered in conjunction with UTA work.	AC	2			AC= End of event.	O	ARCHIVES NOTE: Only speeches, papers, and presentations given by or on behalf of executive staff, board or commission members, division directors and program heads require archival review.	
GEN9	1.1.027	Legislation, Proposed	Drafts of proposed legislation and related correspondence	AV							
GEN10	4.7.012	Signature Authorizations	Signature cards or similar records establishing authority of an agency employee to initiate or authorize financial transactions on behalf of an agency.	AC	4			AC= Until superseded, date of expiration, or termination of employee, whichever sooner.			



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GEN11	1.1.023	Organization Charts	Charts or diagrams that show the structure of an agency and the relationships and relative ranks of its departments and job positions.	US					I	ARCHIVES NOTE: Only charts showing the overall arrangement and administrative structure of the state agency need to be transferred to the Archives and Information Services Division, Texas State Library and Archives Commission. Organizational charts showing division/department level detail are not considered archival.	
GEN12	1.1.024	Plans and Planning	Plans and records relating to the process of planning new or redefined programs, services, or projects of an agency that are not included in or directly related to other records series in this schedule.	AC	3			AC= decision made to implement or not to implement result of planning process.	O	ARCHIVES NOTE: Data processing planning records are not archival.	
GEN13	1.1.055	Strategic Plans	Operational strategic plans, which include descriptions of information resources programs, prepared in accordance with Government Code, 2054.095 and 2056.002. Includes working files and related documentation used in creating the final plan.	AC	6			AC= September 1st of odd numbered calendar years		ARCHIVES NOTE: The final version of Strategic Plans must be submitted to the Texas State Publications Depository Program per 13 TAC 3.3(a)(2)(C). Working files and related documentation used in creating the final plan are not subject to archival review and may be disposed of at the expiration of the retention period.	



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GEN14	1.1.007	Subject Files – Executive	This series documents the executive actions of a state university. The series includes information in the form of correspondence and memoranda, policy statements, organization and program development records, reports concerning accreditation requirements, budget material, faculty and student relations, personnel matters, tenure and salary issues, physical plant development, grant awards, research programs, foundation endowments, fiscal accountability, academic requirements, student athletic issues, and other related topics. These records reflect administration of policies, coordination of institution functions, and overall management of major divisions and departments of a state university.		4					URRS-2	
GEN16	1.1.053	Texas Ethics Commission Registration Logs	Records used to register persons appearing before state agencies for quarterly reports as required by Chapter 2004, Texas Government Code	AC				AC= report filed with Texas Ethics Commission			



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GEN17	1.1.026	Texas Register Submission	Copies of all proposed, withdrawn, emergency, and adopted rules; open meetings notices; or any other documents required by law to be submitted to the Texas Register	AC	1			AC= date of publication			
GEN18	1.1	University and Academic Leadership Meeting Records	This series documents the meetings of the faculty and/or staff of a college, department, or office that sets policy and procedures for the unit. Participants at meetings may be composed exclusively of a mixture of faculty, staff, administrators, and managers; specialized and task oriented sub- committees composed of unit personnel are also documented as part of this record series. These meetings may concern routine matters of procedure and topics such as program development, planning, administrative and personnel management, and assessments of future needs. This series may include but is not limited to: official meeting notes/minutes; reports; and agendas		4				O	. URRS-13	



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GEN19	1.1.067	Reports and Studies (Non-fiscal)	Non-fiscal reports of programs, services, or projects including reports distributed internally or to other entities.		3				O	See RSNI 1.1.065 for raw data used to produce reports. ARCHIVES NOTE: Reports are archival when they deal with significant aspects of the University's programs. For agencies that have had an archival appraisal, separate this records series by each type of archival coding, A, R, or E. See page ix for more information.	
GEN20	3.1.027	Training and Educational Achievement Records (Individual)	Certificates of completion, certifications, licenses, transcripts, test scores, or similar records documenting the training, testing, certification, licensing, or continuing education achievements of an employee.	AC	5			AC= Termination of employment.			
GRAD1		Admission Decision Report (Graduate Studies)		AC	5			AC=Graduation or last attended			
GRAD2		Application Distribution File (Graduate Studies) Statistics		PM							
GRAD3		GRA/GTA (Graduate Studies) Statistical Report		PM							



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GRAD4		Graduate Admission Applications for Students Who DO Enter		AC	5			AC= graduation			
GRAD5		Graduate Admission Applications for Students Who do NOT Enter		AC	1			AC=application term			
GRAD6		Graduate Catalog File		US					I		
GRAD7		Graduate Degree Proposals		PM							
GRAD8		Graduate School Handbook		AC	1			AC= obsolete	I		
GRAD9		Homecoming Files (Graduate Studies)		AV							
GRAD10		Score Distribution Statistical Report (Graduate Studies)		PM							
GRAD11		Test of English as a Foreign Language (TOEFL) Statistical Report (Graduate Studies)		PM							



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HIRE1	3.1.002	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= Termination of employment			
HIRE2	3.1.001	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.	AC	2			AC= Date of the making of the record or the personnel action involved, whichever occurs later.		CAUTION: Does not include ADA Accommodation Requests. See RSIN 3.1.042.	29 CFR 1602.49(a)
HIRE3	3.1.029	Employment Eligibility Documentation I-9	Federal reporting form (Form I-9).	AC	3			AC= 3 years after date of hire or 1 year after termination of employment, whichever is later.			8 CFR 274a.2(b)(2)(i)(A) and (c)(2)



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HIRE4	12.2.001	International Scholars Program Administration Records	This series documents a program which allows one or more visiting scholars to assume residence on campus for an academic year or a shorter duration. This series may include but is not limited to: advertisements; applicant data; arrangements and schedules; publicity and news clippings; presentation transcripts or published works; scholars' vitae; scholars' activities documentation including audio recordings; and related documentation and correspondence		3					URRS-66	22 CFR 62.10(h)
HIRE5	12.1.007	International Scholars Tax Documentation	This series documents international students' and scholars' acquisition of social security numbers. This series may include but is not limited to: social security number applications; Statement of Information - Social Security Account Number forms (CO-204); photocopies of social security cards; Controllers Division reports; and related documentation and correspondence	AC	3			AC= date of application		URRS-54	





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HIRE6	12.1.002	International Scholars J-1 Exchange Visitors Files	This series documents the short-term appointment of nonimmigrant international scholars as visiting faculty, specialists, researchers, and trainees. Records may include but are not limited to: Form DS-2019, Certificate of Eligibility for Exchange Visitor (J-1) Status; descriptions of work to be performed; methods of financial support; copies of passports; check-in forms with personal data such as addresses, telephone numbers, and information concerning dependents; related correspondence, most often concerning eligibility of spouses and children to accompany or join the scholar; log sheets noting the nature of telephone calls concerning each scholar's status; and related documentation	AC	3			AC= end of program participation		URRS-58	CFR 62.10(h)
HIRE7	12.1.003	International Scholars Records – Immigrant Petition File	Includes documentation of an institution's sponsorship of an applicant using USCIS Form I-140 (Immigrant Petition for Alien Worker).	AC	5			AC= date applicant granted lawful permanent residence by USCIS or no longer employed by UTA, whichever is earlier			



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					Years	Months	Days				
HIRE8	12.1.004	International Scholars Records – Labor Certification	This series documents the application and approval of international scholars for permanent immigrant status. Records may include but are not limited to: Application for Permanent Employment Certifications (DOL Form ETA 9089); Application for Alien Employment Certification (DOL Form ETA 750); recruitment reports; copy of job advertisement in national professional journal; wage determinations; and related materials.	AC	5			AC= date of filing the application for employment certification ETA 9089		URRS-59	20 CFR 656.10(f), 29 CFR 1602.49(a) for Employment Opportunity Announcements 29 CFR 1602.49 for Employment Selection records, 29 CFR 1602.49 for Applications for Employment –not hired
HIRE9	12.1.005	International Scholars Records – Nonimmigrant Visa Petition File	Includes both internal documents and forms submitted to the U.S. Citizenship and Immigration Services including Form I-129, Petition for a Nonimmigrant Worker	AC	1			AC=Date the individual is no longer employed by UTA in a sponsored nonimmigrant status		URRS-392	



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HIRE10	12.1.006	International Scholars Records – Nonimmigrant Visa Public Inspection File	This series documents the temporary employment of international exchange visitors (non-immigrants) by the institution and is used to monitor compliance with federal United States Citizenship and Immigration Services (USCIS) regulations. Includes Labor Condition Application (DOL Form 9035/9035E), wage rate documentation, benefits summaries, and related materials for H-1B, H-1B1, and E-3 visas.	AC	1			AC= Last date the institution employs any individual in H-1B nonimmigrant status under the Labor Condition Application for which the Public Inspection File was created or, if no non-immigrants were employed under the labor condition application, one year from the date the labor condition application expired or was withdrawn +1 year		URRS-60.	20 CFR 655.760(c)
HIRE11		Employee Requisitions			2						29 CFR 1602.49(a)
HIRE12	3.1.014	Employment Selection Records	Includes notes of interviews with candidates; questions asked of applicants; audio and videotapes of job interviews; driving record and previous injury checks; pre-employment physical examinations; polygraph examination results; and all other records that document the selection process, except for those noted in Remarks.	AC	2			AC= Date of the making of the record or the personnel action involved, whichever occurs later.		CAUTION: Does not include criminal history checks; see RSIN 3.1.026. Does not include drug screening test results; see RSIN 3.1.040a/b/c.	29 CFR 1602.49(a)



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HIRE13	3.1.026	Criminal Background Checks	Criminal history record information on job applicants or agency employees obtained from the Department of Public Safety (DPS).	AC		6		AC= The criminal history record has served the immediate purpose for which it was obtained.		CAUTION: An agency that is authorized to obtain a criminal history record information from DPS must refer to its agency's legislation or see Subchapter F, Chapter 411, Government Code for appropriate retention and use of this information.	
HIRE14	3.1	Faculty Information		AC	5			AC= termination of employment			
HIRE15	3.1	Student Application for Employment		AC	5			AC= termination of employment			
HIRE16	3.2	Authorization for Professional Services (APS) Forms Independent and Payee Information Forms (PIF)	Records related to requests and approvals to engage and pay non-employee individuals for one-time or sporadic services.	AC	4			AC=termination of contract			
HIRE17	3.2.001	APS Forms Casual and Employee		AC	4			AC= termination of contract			
HIRE18	3.2.006	Wage Rate Tables	Records defining the wage or salary rate for each position in the agency expressed in dollars, grades, or step numbers		2						29 CFR 516.6(a)(2).
HIRE19	3.2.027	Aptitude and Skill Tests	Aptitude and skills tests required of job applicants or of current personnel to qualify for promotion or transfer, including validation records.	AC	2			AC= test no longer used			29 CFR 516.6(a)(2).



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HIRE20	3.3.032	Equal Pay Records	Reports, studies, aggregated or summary data, and similar documentation compiled to monitor and demonstrate compliance with the federal Equal Pay Act.								29 CFR 1620.32
HIRE21	3.1	Background Check Release forms	Paper forms		5						Fair and Accurate Credit Transactions Act PL-108-159
HIRE22	3.1.012	Job Opportunity Announcements			2						29 CFR 1602.49(a)
HIRE 23	3.3.033	Recruitment Plans	Diversity and recruitment plans and related workforce analyses.		3						Texas Labor Code, 21.501 and 502.
HOUS1	5.2	Hall Change Forms		AC	3			AC= terms of contract			
HOUS2	5.2	Housing Inventory		FE	3						
HOUS3	5.2	Housing Reservations		AC				AC= semester end			
HOUS4	5.2	Housing Transactions and Updates		FE	3						
HOUS5	5.1.019	Maintenance Work orders		LA	3						
HOUS6	5.2	Occupancy Reports (Housing)			5						
HOUS7	5.2	Occupant Termination Notice		CE	3						
HOUS9	5.2	Residence Hall Roster		US							
HOUS10		Residence Hall Status Card		AC	3			AC= term of contract			



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HOUS11	5.2	Room change Forms (Housing)		AC	4			AC= terms of contract			
HOUS12	16.4.003	Student Housing Applications	Applications and selection decision documentation for applications that do not result in occupancy. May also include consumer reports and authorizations to obtain credit information.	AC	1			AC= end of application term		CAUTION: If the institution obtains credit report information, then records created under this series must be retained 5 years beyond the application term. For applications that do result in occupancy, see URRS 16.4.005.	Fair Credit Reporting Act (FCRA), 15 USC 1681p
HOUS13	16.4.004	Student Housing Judicial Record	This series provides a record of the disposition of appeals made by residents who violated housing policies and were assessed penalties for failing to follow terms of their housing or food service contracts. Typical records include: students' appeals stating their reasons for seeking modification of contract terms; decisions from the director of housing, including instructions for further appeal if students have additional relevant information and desire to proceed; and related documentation and correspondence	AC	4			AC= expiration of contract or resolution of incident, whichever is later		CAUTION: See URRS 16.3.027 for incidents referred to law enforcement. See URRS 15.5.007 for incidents that result in disciplinary action.	URRS-238



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HOUS14	16.4.005	Student Housing Tenant Records	This series provides a record of occupancy in all institution administered housing -- residence halls, family housing, or cooperative housing. This series may include but is not limited to: housing applications and contracts; proof of admission records; and related documentation and correspondence.	AC	4			AC= end of student's occupancy or, for contracts, expiration of contract			
HR1	3.1.006	Employee Counseling Records	Notes, memoranda, or reports relating to the counseling of an employee. Usually maintained at the supervisory level	AC	3			AC= termination of counseling			
HR2	3.1.012	Employment Opportunity Announcements	Internal or external announcements or advertisements of job openings, promotions, training programs		2						29 CFR 1602.49(a)
HR3	3.3.01	UTA's Opportunity Plan			5						
HR4	3.3.022	Veterans' Workforce Summary			3						
HR5	3.3.22	Work Force Annual Report			3						
HR6	3.1.055	Employment Contracts, Including Performance Bonds, Executed, Amended, or Renewed on or After September 1, 2015	Bonds posted by employees and individuals or entities under contract with an agency for the performance of the duties of a position or the terms of a contract with the agency	AC	7			AC= expiration or termination of the bond according to its terms			Texas Government Code 441. 1855



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HR7	3.3	Outside/Secondary Employment Requests and Authorizations		AC	2			AC= termination of employment		URRS-504	
HR8	3.1	Separated Faculty/staff Personnel Files	This record series includes training and educational achievement documents, employee recognition documents and employee recognition documents . Also public access option forms and certificates and licenses	AC	10			AC= termination of employment			
HR9	3.3.011	Former Employee Employment Verification Information	Minimum information needed to verify employment. Includes: name; social security number; exact dates of employment; last known address; and most recent public access authorization.	AC	75			AC= termination of employment			
HR10	3.1	Temporary Services Request		AC		3		AC= termination of employment			
HR11	3.1.011	Employee Benefits Other than Insurance		AC	2			AC= superseded or employee terminated whichever is later			
HR12		HRIS (Human Resource Information System) Reports and documentation		FE	4						





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HR13	3.1.023	Job Descriptions	Job descriptions, including all associated task or skill statements, for positions in an agency.	AC	4			AC= Superseded or job eliminated			40 TAC 815.106(i)
HR14	3.1.019	Manager’s Employee Personnel File, Including Job Evaluations	Job evaluations, performance appraisals, or other similar documents used to evaluate the performance of an employee.	AC	5			AC= evaluation completed or termination of employment whichever is sooner			29 CFR 1620.32(c)
HR15	3.3.024	Staff Handbook and Working Files		US	3						
HR17	3.1	Student Personnel Files		AC	5			AC= termination of employment			
HR18	3.1	Employee Training Handbook		AC	1			AC= superseded	O		
HR19	3.3.022	Texas Workforce Commission (TWC) Reports	Reports to the agency from TWC or its predecessor pertaining to employees.		3						
HR20	3.3.010	Quarterly Full Time Equivalent (FTE) Report			3						
HR22	3.1	Work Study Forms		FE	5						
HR23	3.1	Yearly Employee Files Federal Work Study Off-Campus			1						
HR24	3.2.001	Retired Faculty/staff Personnel Files	Retirement authorization forms for deferred compensation .	AC	50			AC= termination of employment			



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HR25	3.1.006	Employee Assistance Program (EAP) Counseling Records		AC	7			AC= termination of counseling			22 TAC §681.41(q) and ( r ) 22 TAC §465.22(d); 22 TAC §165.1(b);
HR26	3.4.007	Employee Leave Records	Requests and authorizations for vacation, compensatory, sick, Family and Medical Leave Act (FMLA), sick pool leave, and other types of authorized leave, and supporting documentation.	FE	3						Government Code, Section 661.152(d); 29 CFR 825.500(b).
HR27	3.4.004	Overtime Schedules and Authorizations	Records created to schedule time worked by employees outside of or in addition to their regular working hours, including approval authorizations.		2					CAUTION: Only includes overtime schedules and authorizations. See RSIN 3.4.006 for timekeeping records.	
HR28	3.4.008	Sick Leave Pool Documentation	Records documenting number of hours transferred in and out of comprehensive sick leave pool.	FE	3						
HR29	1.1.056	ADA (Americans with Disabilities Act) Accommodation Requests	Requests for employees participating in the Services to Students with Disabilities (SSD) or similar program, and anyone visiting university facilities. Includes supporting documentation	AC	3			AC= date of last contact		URRS-246	



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HR30	18.3.001	Staff Election Records	This series documents elections held by various staff organizations. This series may include but is not limited to: ballots; tabulations; and related documentation	AC				AC= results verified		URRS-338	
HR32	3.1.020	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= termination of corrective action			



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HR33	3.1.021	Personnel Disciplinary Action Documentation	Disciplinary actions are those actions which may affect pay, status, or tenure. They are imposed to discipline an employee whose conduct is harmful to the best interests of the state, the agency, or the employee work force; and for failure to improve performance or conduct following imposition of corrective action. May include cause for demotion, suspension, or dismissal, and the reasons for failure to give written notice of resignation. May also be used to document evidence of employee self-improvement efforts, as well as favorable and unfavorable communication.	AC	5			AC= termination of employment			
HR34	3.1.019	Employee Performance Evaluations	Job evaluations, performance appraisals, or other similar documents used to evaluate the performance of an employee.	AC	5			AC= evaluation completed or termination of employment whichever is sooner			29 CFR 1620.32(c)



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HR35	3.1.055	Employment Contracts, Including Performance Bonds, Executed, Amended, or Renewed on or before August 31, 2015	Bonds posted by employees and individuals or entities under contract with an agency for the performance of the duties of a position or the terms of a contract with the agency	AC	4			AC= expiration or termination of the bond according to its terms			Texas Government Code 441. 1855
HR36	3.1.040a	Employee Drug Testing and Screening Records – Positive Results and Calibration	Records of employee alcohol test results indicating an alcohol concentration of 0.02 or greater; records of employee verified positive controlled substances test results; documentation of refusals to take required alcohol and/or controlled substances tests; employee evaluation and referrals; calibration documentation; records related to the administration of the alcohol and controlled substances testing programs; copy of each annual calendar year summary.		5						49 CFR 382.403 for commercial motor vehicle drivers.
HR37	3.1.040b	Employee Drug Testing and Screening Records – Collection Records	Records related to the alcohol and controlled substances collection process (except calibration of evidential breath testing devices).		2					See RSIN 3.1.040a for calibration documentation.	



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HR38	3.1.040c	Employee Drug Testing and Screening Records – Negative Results	Records of negative and canceled controlled substances test results and alcohol test results with a concentration of less than 0.02.		1						
HR39	3.1.041	Employee Acknowledgement and Agreement Forms	Agreements between employee and agency authorizing certain actions, including acknowledgement forms, telecommuting agreements, outside/secondary employment authorizations, or other documentation that show proof of receipt and awareness of and adherence to agency policies and procedures.	AC	2			AC= Until superseded, obsolete, or date of separation, as applicable.			
HR40	3.1.042	ADA Accommodation Requests	Employee or applicant requests for reasonable accommodation under the ADA (Americans with Disabilities Act).	AC	2			AC= For employees, termination of employment; for job applicants who were not selected, date of application.			29 CFR 1602.31.
INSCOM1	5.4.001	Workers' Compensation Reports, Accident Reports and Associated Documentation	Accident or occupational disease reports by supervisors and employees and other associated reports required to be submitted to the Texas Department of Insurance or its predecessors or maintained internally on accident frequency.	CE	5					. The Texas Department of Insurance retains copies of the reports submitted to it for 50 years.	29 CFR 1904.33



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INSCOM2	5.4.001	Workers' Compensation Reports Involving Exposure to Airborne or Bloodborne Pathogens		AC				AC= termination of employment			29 CFR 1904.33
INSCOM3	3.1.011	Employee Insurance Benefits	Agency copies of information relating to the selection by employees of life, disability, health, and other types of insurance offered by the State of Texas to its employees	AC	10			AC= Until superseded or termination of employment.		CAUTION: Documents that serve as payroll deduction authorizations must be maintained for the retention period prescribed for RSIN 3.2.001.	
INSCOM4	3.1.011	Retiree Insurance Including Life Insurance		AC	10			AC= termination of employment			
INSCOM6	3.2.001	Insurance Changes			4						
INSCOM7	4.1.009	Insurance Premium Billing Reconciliation, CBO undefined			4						
INSCOM8	3.2.001	Employee Bonds and Contributions			4						
INSCOM9	3.2.001	Retiree Payments			4						
INSCOM10	3.2.001	Teachers' Retirement System (TRS)"TRAQS" Report			4						



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INSCOM1 1	3.2.002	Employee Earnings Records	Payroll records and registers documenting employee earnings, wages, and pay. This may include but is not limited to payroll input records, summary statements, payroll vouchers, payroll detail sheets, and payroll history.		4						40 TAC 815.106(i)
INSCOM1 2	3.2.003	GLACIER System/Non-resident Alien Information	Nonresident Alien (NRA) and Resident Alien (RA) employee tax records and analysis from the GLACIER System and also includes their I-20s, I-94, Visas, and 8233 forms.	AC	10			AC= separation of employment			26 CFR 31.6001 - 1(e)(2)
INSCOM1 3	3.2.002	Employee Payment Request Forms	Documentation related to employee stipends, incentive pay, and additional pay (does not include merit increases or raises)		4						
INSCOM1 4	3.2.001	Authorizations for Garnishments and Other Deductions	Documentation to start, modify, or stop deductions from payroll, including court-ordered attachments.		4						
INSCOM1 5		Salary Survey Files			4						
INSCOM1 6	3.3.015	Position Audits (Reviews)		AC	3			AC= superseded			
INSCOM1 7	3.1.027	Retired Faculty and Staff Personnel Files	Includes training and educational achievement documents.	AC	10			AC= retirement			





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INSCOM18	3.3.004	Insurance Benefits Plans, Group Plans		AC	3			AC= superseded			29 CFR 1627.3(b)(2)
INVEN1	5.2.006	Annual Inventory Certification	Records documenting the inventorying, maintenance, usage, and disposal of supplies, equipment, and property of a state agency. Includes lost, stolen, and damage reports.	FE	3					See RSIN 5.2.008 for the maintenance logs of individual pieces of equipment.	
INVEN2	4.7.004	Capital Assets Records	Documentation relating to the capital and fixed assets of a state agency, including equipment or property history cards containing data on initial cost, depreciation schedules or summaries used for capital outlay budgeting, and property sale, auction, or disposal records of agency owned equipment and property.	LA	3						
INVEN3	5.2.006	Inventory and Property Control Records	Records documenting the inventorying, maintenance, usage, and disposal of supplies, equipment, and property of a state agency. Includes lost, stolen, and damage reports.	FE	3			See RSIN 5.2.008 for the maintenance logs of individual pieces of equipment.			
INVEN4	5.2.006	Merchandise Inventories (Housing)		FE	3						



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INVEN5	4.7	Real Property Records	Includes purchase contracts, gift agreements, deeds, wills, codicils, estate inventories, probate records, minute orders (authorizing purchase, gift, or sale of a portion of the asset), restrictions, judgments, title policy or opinions of title, closing documents, surveys, maps, plats, property descriptions, surety bonds, and related correspondence	LA	10					URRS-80	
INVEN6	5.2.001	Appraisals - Building or Property	Assessments or evaluations of the value of state-owned buildings or property.	AV					O		
INVEN7	4.7	Real Property Tax Records		AC	11			AC= sale of property			
INVEN8	5.2.006	Certificates of Property Destruction			10						
INVEN9	5.2.006	Surplus Property Sales Records	Records are provided by an online auction agent.	FE	3						
INVEN10	4.1.001	Texas Facilities Commission Statements (Texas Bldg. and Procurement Commission Statements)	Charge or bill statements received by the University from the TFC for services provided.	FE	3						
INVEN11	5.2.011	Warranties		AC	1			AC= Expiration of warranty			



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INVEN12	5.6.007	Vehicle Registration	Vehicle titles, registration information, and owner manuals for state vehicles.	LA							
IER1	1.1.064	SACSCOC Substantive Change Documents	Notification letters and substantive change prospectuses for modifications or expansions of the nature and scope of an accredited institution, including academic programs.	PM							
IER2	1.1.064	Unit Effectiveness Process (UEP) Report	Reports generated by units across the university documenting outcome assessment plans and subsequent assessment results data and any implemented improved based on the assessment data.	FE	10					See RSIN 1.1.068 for reports on agency performance measures.  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.	
IER3	1.1.068	Quality Enhancement Plan (QEP) Reports	Documentation of outcomes, efficiency, performance measures used to manage the university.	PM							



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IER5	1.1.038	Students and/or Faculty Survey (Individual) Responses	Data gathered from the administration of the Student Feedback Survey (SFS), Undergraduate Exit Survey, National Survey of Student Engagement (NSSE), or any other survey, to include surveys administered to faculty, administered across the university or large sub-sections of the university.	AC				AC= final disposition of summary report			
IER6	1.1.064	Regional Accreditation Records - Working Files	Drafts of any Regional Accreditation Reports as well as various documentation that supports the university's case for compliance with SACSCOC Standards of Accreditation	AC				AC= end of two accreditation cycles			
IER7	1.1.064	Regional Accreditation Reports	Includes decennial Compliance Certification, 5th Year Interim Report, as well as any Response Reports, Focused Reports, Monitoring Reports, and Special Reports. Also includes the annual Enrollment Report and Financial Report.	PM					I		
IER8	1.1.064	Core Curriculum Assessment Reports	Data and subsequently compiled reports on the assessment of the Core Curriculum Objectives.	FE	10						



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IER9	1.1.064	Quality Enhancement (QEP) Data	Data derived from the assessment of the outcomes/objectives of the Quality Enhancement Plan.	FE	3					See RSIN 1.1.068 for reports on agency performance measures.  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.	
IT1	2.1.009	Automated Applications Documentation	Documentation related to batch processing.		3						
IT2	2.2.002	Chargeback Records	Records documenting usage, costs, billing, cost recovery, budgeting, and administrative functions of computer usage and information technology services for individual units/departments/divisions.	FE	3						
IT4	2.2.016	Software Registrations, Warranties, and License Agreements	Records documenting the registration and licensing of a software application to activate the software for legal use by the end users of a state agency, along with warranties providing that the software will perform in accordance with functional specifications.	LA	3						



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IT6	5.4.013	Disaster Recovery Plan (OIT)	Plans developed (per Texas Labor Code, 412.054) to mitigate the damage of potential events that could endanger an agency's ability to function. Includes disaster preparedness, response, and recovery plans.	US						See RSIN 5.4.017 for records related to responding or recovering from an emergency.	
IT8	2.2.017	Helpdesk Request Logs and Reports	Records documenting the request for and response to help desk tickets received by divisions or units, such as information technology.	AV							
IT12		Physical Layout (OIT)		AV							
IT13	4.1.001	Purchase Order Logbooks (OIT)		FE	3						
IT14	1.1.067	Reports for Automatic Backup Restore/Full Dump Restore Backups				3			O	Data is no longer retained.	
IT15		Requests for Service (OIT)		FE	3						



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IT16	2.1.007	Software Programs	Agency-developed automated software applications, operating system files, and associated processing files, including job control language, programs, applications, scripts, source code, etc.	AC				AC= 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.		CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.	13 TAC 6.94
IT17	2.2.008	Hardware Documentation	Software needed for access to electronic records must be retained for the period of time required to access the records. 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= 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



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IT18	2.2.008	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. CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records	AC				AC= 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. Documentation for vendor cloud storage is maintained by the vendor.			13 TAC 6.94





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IT19	2.1.010	Audit Trail Records	Files needed for electronic data audits such as files or reports showing transactions accepted, rejected, suspended, and/or processed; history files/tapes; records of online updates to application files or security logs	AC				AC= when all audit requirements have been met			
IT20	2.2.001	System Monitoring Records	Files needed for electronic data audits such as files or reports showing transactions accepted, rejected, suspended, and/or processed; history files/tapes; records of online updates to application files or security logs.	AV							
IT21	1.1.069	Computer Job Schedules and Reports	Scheduled or similar records showing computer jobs to be run and other reports by computer operators or programmers of work performed		3					If reporting to UEP, then 1 year	



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IT22	2.2.010	Data Processing Policies and Procedures	Manuals, guidelines, or similar documents establishing data processing policies and procedures in an agency in such areas as access and security, systems development, data retention and disposition, data ownership, production control, system back-up, etc. CAUTION: Does not include technical documentation of procedures necessary for reading or processing of electronic records	US	3						
IT23	2.2.011	Batch Data Entry Control Records	Forms and logs used to reconcile batches submitted for processing against batches received and processed.	AC		3		AC= when reconciliation is confirmed			
IT24	2.2.011	Output Records for Computer Production	Reports showing transactions that were accepted, rejected, suspended, and/or processed.	AV							



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IT25	2.2.013	Quality Assurance Records	Information verifying the quality of system, hardware, or software operations including records of errors or failures and the loss of data resulting from such failures, documentation of abnormal termination and of error free processing, checks of changes put into production, transaction histories, and other records needed as an audit trail to evaluate data accuracy	AC				AC= no longer needed as an audit trail for any records modified			
IT26	2.2.014	History Files - Websites	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							
IT27	2.2.014	Internet Browser Files	A record of web pages visited during an internet session, including data files of user-specific information created by the webserver, that allows users to access previously visited pages more quickly or to generate a record of usage of a state-owned computer.	AV						The disposal of internet history records need not be documented through destruction authorizations (RSIN 1.2.001) or in records disposition logs (RSIN 1.2.010), but agencies should establish procedures governing disposal of these records as part of its records management plan (RSIN 1.2.014).	



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					Years	Months	Days				
IT28	1.3.001	Website Publications	Publicly accessed web content (displayed via Hypertext Markup Language (HTML), Cascading Style Sheets (CSS), programming or scripting languages, and text files); website assets such as images, documents, Portable Document Format files (PDFs), and videos; and data stored in databases or on other servers. One copy of each state publication as defined on page xi of this schedule, except a publication that is subject to a different retention period in this schedule. For example, a meeting agenda (see RSIN 1.1.058) also meets the definition, but it must be retained permanently; RSIN 1.1.004, 1.1.055, 1.1.066, 1.1.068, and 4.5.003, which also meet the definition, are closely associated with the appropriations process and must be retained AC + 6.	AC	2			AC= Until superseded or obsolete.	O	Public facing sites of the University must be preserved in accordance with requirements for university publications. All websites must undergo archival evaluation when all other retention requirements have been met. CAUTION: Many state publications must be submitted to the Texas State Publications Depository Program, Texas State Library and Archives Commission, by law (Government Code, 441.103-441.105). 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. For additional information and requirements concerning state publications made available to the public through the internet, consult the administrative rules of the Texas State Publications Depository Program of the Texas State Library and Archives Commission (13 TAC §§3.1-3.8).	



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IT29	2.2.018	Biennial Information Security Plan	Biennial plan for protection of the University's information.	US							1 TAC 202.23 and 1 TAC 202.73
IT30	5.4.012	Information Security Records - General	Records relating automated systems. Includes code lists, access logs, requests for passwords, password changes, passwords assigned, password lists, lists of staff and associated privileges, etc. Does not include discovery or tracking of unauthorized computer access which is found in enterprise wide information security violations	AC	2			AC= until superseded, expired, or terminated, whichever is sooner			
IT31	2.2.001	Information Security Violation Tracking	Consists of electronic files or automated systems logs that monitor security violations to servers if needed to provide evidence or for documenting security incidents. Includes intrusion detection logs, server event logs, and router logs.	FE	2						
IT32	2.2	Information Security Assessment Observation Data	Data gathered from assessments (penetration testing) performed on university information systems. DIR has an official record copy	AC	3			AC= date of report			
IT33	2.2	Security Incident Reporting	Information concerning violations of security policy reported monthly to DIR by the University. DIR has an official record copy.	FE	3						TAC 202.26 TAC 202.76



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IT34	2.2	Security Reports	Reports on information security assessments (penetration testing) performed by the University. Includes report on the status and effectiveness of information resources security controls submitted to the President by the Information Security Officer. DIR has an official record copy received from UTA.	AC	3			AC= date published			TAC 202.21(d)(4)
IT35	2.2	System Access Documentation - General	Includes electronic files or logs documenting use of or access to university automated systems.		3					Subject to contract conditions	
IT36	2.2	System Access Documentation - Unauthorized	Includes documentation of unsuccessful access attempts by unauthorized users. Used to evaluate system security and to identify specific problems and sources. Provides documentation of declared incidents that may be used for corrective or legal responses.		3						
IXEOS1	1.1.073	Administrative Hearings	Transcripts and final decisions of hearings conducted as part of the regulatory process, and hearings on proposed rules and changes.	AC	3			AC= last action	O	CAUTION: These records may be maintained with related information, including meeting notices, proofs of publication, and meeting minutes, and require a longer retention period.	



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IXEOS2	3.3.001a	Affirmative Action Plans for Regular Employees	Affirmative action plans for regular employees.		5						29 CFR 30.12(d), 41 CFR 60.1.12(b)
IXEOS4	3.3.031	Affirmative Action Reports			3				O		
IXEOS5	3.3.031	EEO Reports	Quarterly equal opportunity reports required by the State.		5						29 CFR 1602.30, 1602.32, 1602.39, 1602.41, 1602.48, 1602.50
IXEOS6	3.1.018	Employee Grievance Records	Records relating to the review of employee grievances or complaints against personnel policies, working conditions, etc.	AC	2			AC= final decision on the grievance		CAUTION: Does not include formal complaints filed by an agency employee with the Equal Employment Office (EEO) of the U. S. Department of Labor (DOL). See RSIN 1.1.048.	
IXEOS7	3.1.018	EEO Complaint Files	Records relating to the review of employee complaints alleging unlawful discrimination.	AC	5			AC= final decision		CAUTION: Does not include formal complaints filed by an agency employee with the Equal Employment Office (EEO) of the U. S. Department of Labor (DOL). See RSIN 1.1.048.	



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LEGAL1	1.1.014	Legal Opinions, Correspondence and Advice	From university or OGC legal counsel or the Attorney General, including any requests 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, or opinions rendered for Public Information Act Requests. See RSIN 1.1.048, 1.1.020, and 1.1.021.  ARCHIVES NOTE: Opinions and advice 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.	
LEGAL2	1.1.048	Litigation Files	Created in Anticipation of or in Adjudication of a Lawsuit	AC	1			AC= decision of the University not to file a lawsuit or decision that a lawsuit will not be filed against it; dismissal of a lawsuit for want of prosecution or on motion of plaintiff, or final decision of a court (or of a court on appeal, if applicable) in a lawsuit.	O	ARCHIVES NOTE: 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. See page ix for more information.	





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LEGAL3	1.1.048	Court Cases		AC	20			AC= disposition of case and end of all applicable statutes of limitations		ARCHIVES NOTE: Opinions and advice 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	
LEGAL4	16.3.010	Clery Act Reporting - Annual Security Report	Annual security report created pursuant to the Clery Act		7				O		20 USC Section 1092(f) 34 CFR Section 668.46 URRS-226.
LEGAL5	16.3.013	Clery Act Reporting - Emergency Response and Evacuation ("Timely Warning") Procedures	Policies developed to provide warning to students and employees of crimes representing a "serious or continuing" threat to safety, as required by the Clery Act. 20 USC 1092(f); 34 CFR 668.46(g). Should show that warning was issued as soon as pertinent information became available, the nature of the crime, the content of the warning and to whom it was sent	AC	7			AC= superseded, expired, or discontinued			
LEGAL6		Clery Act Correspondence with the Department of Education			7						



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LEGAL7	1.1.070	Handbook of Operating Policies (HOP)	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. Includes working files and related documentation used in creating rules, policies, and procedures.	AC	3			AC= Until superseded, or termination of program, rules, policies, or procedures, whichever applicable.	O	ARCHIVES NOTE: Working files and related documentation used in creating the final rules, policies, and procedures, are not subject to archival requirement and may be disposed of at the expiration of the retention period.	
LEGAL9	1.1.006	Complaints and Appeals	Caution: if a complaint becomes the subject of litigation, then it must be included in and is subject to the retention for litigation files.	AC	2			AC= resolution			
Legal10	1.1.076	Subpoenas	Subpoenas for production of evidence produced for litigation in which the state agency is not a party. Includes legal documents requiring recipient to appear in court to testify, or to produce records to be used in litigation.	AC				AC= Date request fulfilled.		For subpoenas related to litigation in which the state agency is a party, see RSIN 1.1.048.	



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Legal 11	1.1.078	Waivers of Liability	Waivers of liability, including statements signed by volunteers acknowledging non-entitlement to benefits, agreeing to abide by state agency policies, etc.	AC				AC= Date of cessation of activity for which the waiver was signed.		CAUTION: If an accident occurs to any person covered by a signed waiver of liability, it must be retained for the same period as accident reports. See RSIN 5.4.001 and 5.4.014.	
LIB1		Conservation/Preservation Files		AV							
LIB2	13.2	Library Gift Files		PM					I		
LIB3	16.2.007	Interlibrary Loan (ILL) Records	This series documents requests made of the institutions within the university library system for materials by outside institutions and also institution requests for materials from other library systems. This series applies to circulating library resources only (not to archival, special collections or museum materials).	FE	3					URRS-209	
LIB5	1.1.024	Plans and Records Relating to the Process of Planning (Library)	New or redefined programs, services, or projects of an agency that are not included in or directly related to other records series in this schedule.	AC	3			AC= decision to implement or not implement result of planning process.	O	ARCHIVES NOTE: Data processing planning records are not archival.	
LIB6	16.2.008	Library Catalog	Catalog of bibliographic records used as a guide to library holdings.	US						URRS-201	



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LIB7	16.2.009	Library Materials Control Records	Includes records of the acquisition and cataloging of library material.	AC				AC= catalog is updated		CAUTION: Does not include the library catalog. See URRS 16.2.008.  CAUTION: SEE RRS 4.7.004 for records documenting purchase of library materials.  The disposal of library material control records needs not be documented through destruction authorizations, see RRS 1.2.001, or in records disposition logs, see RRS 1.2.010.	
LIB8	16.2.010	Patron Registration Records	Patron registration forms filled out by archives users to gain access to the reading room to view archival materials. May also include photocopies of photo identification or other related materials		4					See RRS 5.4.011 for sign-in sheets, guest books, patron logs, and similar records documenting visitors to limited access or restricted areas of university facilities.	



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LIB9	16.2.012	Reference Request Records	This series documents requests for information about, or access to, items within the institution's collections. This series may include but is not limited to: reference request forms, general email correspondence, disposition of or time spent fulfilling the requests, call slips (also called pull slips), and related documentation and correspondence	FE	3				I	URRS-206	
LIB10	16.2.001	Circulation Records	This series documents the borrowing of circulating library materials by qualified patrons. This series may include but is not limited to: the name and identification of the borrower; the titles of materials borrowed; the due date; overdue and fine payment notations; and related documentation and correspondence	AC				AC= completion of transaction		The disposal of circulation records needs not be documented through destruction authorizations, see RRS 1.2.001, or in records disposition	



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LIB11	16.2.002	Library Collection Control Records	This series documents the maintenance of materials which typically involve accessioning, cataloging, preserving, and/or referencing. This series may include but is not limited to: deeds of gift; appraisal reports (monetary or non-monetary); accession sheets; archives transmittal lists; accession reports; purchasing information; recommendations concerning deaccessioning of specific holdings and action upon those recommendations; and related documentation and correspondence	PM					I	See RRS 2.1.011 (Finding Aids, Indexes, and Tracking Systems) for archival finding aids.	
LIB12	16.2.003	Library Collection or Artifact Loan Records	This series documents artifact and material loans contracted between units of the institution or between the institution and either other institutions or individuals. These records include: signed and legally binding agreements for incoming and outgoing loans between the collection administrators; receipts for loans and return of materials to the legal holder; and related forms, documentation and correspondence	AC	4			AC=acceptance of return		Upon the expiration of the retention period, repositories should consider transferring loan records to the URRS 16.2.002 Collection Control Record if they possess continuing reference or administrative value.	



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LIB13	16.2.004	Courtesy Borrower Records	Records documenting guest borrowers of library materials. Records may include guest borrower's name, address, telephone number, company or institution name, and patron status. Expiration of borrowing privileges and clearing of fines	AC				AC= expiration of borrower privileges and clearing of fines		CAUTION: If borrower application serves as an agreement between the borrower and the institution (e.g., to follow library rules), see RRS 5.1.001.	
LIB14	16.2.005	Equipment Checkout Records	Records documenting the physical control of the library's lending program for equipment (e.g., laptops, tablets, cameras, etc.) to individual borrowers.	FE	3						
LIB15	11.1.011	Photographs, Audio-visual Recordings, and Other Items of Archival Value	This series includes photographs, digital images, photographic scrapbooks, negatives, slide formats, sound recordings, videotapes, posters, and other media that document institutional history and activities, except such records noted elsewhere in this schedule.	AV					O	Archivists should apply archival selection criteria in the appraisal of these items. Selection criteria may include level of identification. Archivists may arrange with digital asset managers or similar personnel to identify historical photographs prior to transfer to the archives	



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LIB16	16.2.006	Exhibit Records	This series documents the display and use of artifacts and materials held by the collection units or displays created by the units. This series may include artifact labels or placards, photographs of exhibits, planning documents, publicity materials, exhibit renderings, exhibit assembly and presentation instructions, and related documentation and correspondence.	AC				AC= conclusion of exhibit	O	ARCHIVES NOTE: For museums, archival review and selection may be performed by museum curatorial staff. Materials pertaining to major exhibits may possess long-term historical value and may be retained either in the institutional archives or the museum unit, as appropriate.	
MAIL1	5.1.014	Delivery Notices	Internal electronic delivery receipts and hard copy freight bills and other receiving documentation		2						
MAIL2	5.2.029	Returned Mail	Documentation of mail returned by the postal or other mail delivery services as undeliverable.	AC	1			AC= date returned		CAUTION: If corrected address provided and mail rerouted, maintain address update documentation for prescribed retention period.	
MAVID1	16.5.008	Mav Express Card Access Data and Administration Records	This series includes images, application forms, or similar records documenting the issuance of identification cards to university students, staff, or faculty.	AC				AC= superseded or terminated		CAUTION: For records documenting the issuance of keys, identification cards, or similar instruments of access to university facilities, see RRS 5.4.012.	





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MAVID3	5.4.011	Visitor Access Control Records	Logs, registers, videos, or similar records documenting the issuance of identification cards to university students, staff, faculty, or other authorized persons.		3						
MEDREC2		Student Health Insurance Files		AC	10			AC= date of last attendance			
MEDREC3	16.1.001	Abuse and Neglect Records	This records series documents abuse and/or neglect findings observed during patient care. The findings may be evidence of child, domestic, elder, or other kinds of abuse. This series may include but is not limited to: incident/variance reports submitted to the proper authorities and related correspondence	AC	10			AC = Report date. If the patient is a minor, the record retention period is extended until ten years after the minor reaches the age of majority.		URRS-447	



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MEDREC4	16.1.008	Counseling Case Records	This series documents all clients who are provided counseling services by the institution's counseling center. Clinicians provide treatment concerning personal problems, academic concerns, and career concerns. Records may include: extensive notes made by providers concerning the assessment, diagnosis, treatment and contacts (written, telephone, or in person) with each client; referral letters; release of information agreements; letters to agencies or others concerning the clients; and related documentation	AC	10			AC= date of last contact with client		URRS-511	22 TAC 681.41(r)
MEDREC5	16.1.009	Disclosure of Protected Health Information	This records series documents disclosure of Protected Health Information (PHI) in accordance with the Health Information Portability and Accountability Act compliance regulations	FE	10					URRS-456	



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MEDREC6	16.1.011	Medical Assistance Application	This records series contains applications submitted on behalf of a patient to a drug company's or medical institution's assistance program. The series may include, but not be limited to: program application forms, validation letters and forms for reapplying, and any paperwork that may be included with the medications when they are sent to the department and subsequently dispensed to the patient.	US	1					URRS-458	
MEDREC7	16.1.012	Drug Recall Notices	Food and Drug Administration (FDA) and manufacturer recalls on drugs. This records series may include but not be limited to, reportable occurrences of drug use, recalls through the manufacturer and responses by departments.	AC	10			AC= records of manufacture have been completed or six months after the latest expiration date for the product whichever is later		URRS-459	21 CFR 600.12 21 CFR .49



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MEDREC8	16.1.013	Final Laboratory Test Reports - Pathology	This records series consists of the legally reproduced copies of each test result and preliminary reports on pathology testing. Documentation includes all the information recorded on the test requisition plus the specimen's accession number, the date and time the lab received the specimen, the condition and disposition of samples which do not meet the lab's acceptance standards, the records and dates of performance of each step in the patient testing leading to and including the final report. This series is specific to pathology, histology, and cytology records		10					URRS-460	42 CFR 493.1101
MEDREC9	16.1.016	Health Assessment	This series documents provision of health-related services, for example: cholesterol screening, blood pressure testing, etc. This series may include but is not limited to: tests; goals and objectives; diagnostic reports; questionnaires; permission to forward the information to the patient's primary care physician, and related data	AC	10			AC= last visit		URRS- 461	



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MEDREC10	16.1.018	Immunization Record and Consent Forms	Signed consent forms and records noting the type of immunization performed which are not included in the patient's medical record.	AC	10			AC= 21st birthday or 10 years following calendar year in which the consent form was signed, whichever is later		CAUTION: For immunization reports required by the Texas Education Code and the Texas Health and Safety Code, see RRS 1.1.007.	
MEDREC12	16.1.021	Licensure Records for Health Personnel and Facilities	This series documents the professional and regulatory issuance of credentials to individuals and facilities providing services within the health institution. This series may include but is not limited to: license applications; College of American Pathologist comparative test results for laboratory licensing; Pharmacy Board Retail Drug Outlet/Controlled Substance Registration (license) and inspection reports; individual employee professional licenses; and related correspondence. Institutions should ensure that they are keeping licenses for as long as required by the organization issuing the license .	US						URRS-192	



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MEDREC13	16.1.023	Medical Device Recall Notices and Responses	Food and Drug Administration (FDA), Safety Medical Device Act (SMDA) and manufacturer recalls on all medical, food and drug devices. This records series may include but not be limited to, reportable occurrences on devices, recalls through the manufacturer and responses by institutional departments.	AC				AC= 15 years or expected life of device, whichever is longer		URRS-469	21 CFR 806.20( c) 21 CFR 821.60



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MEDREC14	16.1.025	Medical Records, Student Health Clinic	This series documents the medical services history provided for students treated by the student health center. This series may include but is not limited to: appointment request slips; summary sheets; bacteriology test results; treatment record forms; diagnosis sheets; health history/screening sheets; initial evaluation/assessment sheets; referral sheets; health center billing statements; personal health history sheets; dental examination sheets and X-rays; laboratory test results; physical therapy notes; X-ray release forms; X-ray requisitions with narrative of radiologist; notes; memoranda; and related correspondence.	AC	10			AC= date of last service or patient's 21st birthday, whichever is later		URRS- 191	22 TAC 165.1(b)



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MEDREC15	16.1.031	Pharmacy-Drug Administration Records	Inventory and other records of the purchase, acquisition, disposal, or dispensation of drugs as required by federal law and regulations, state law, and the rules of the Texas State Board of Pharmacy. By federal regulation, inventories and records of all controlled substances must be maintained separately from all other records of the pharmacy.	AC	2			AC= date record was ordered, date record was created, or date prescription filled, whichever is later		URRS-187	21 CFR 1304.04(a) Health and Safety Code Section 481.067(c) 37 TAC 13.207





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MEDREC1 6	16.1.032	Pharmacy Prescription File	Paper prescription slips or electronic prescription records for controlled substances maintained in accordance with federal law and regulations, state law, and the rules of the Texas State Board of Pharmacy. By federal regulation, paper prescriptions for Schedule II controlled substances shall be maintained in a separate prescription file. Paper prescriptions for Schedules III, IV, and V controlled substances shall be maintained either in a separate prescription file for Schedules III, IV, and V controlled substances only or in such form that they are readily retrievable from the other prescription records of the pharmacy. Electronic records must be readily retrievable at the registered location if requested by the Drug Enforcement Administration (DEA) or other law enforcement agent. An electronic application storing prescription data must be capable of printing out or transferring the records in a format that is readily understandable to a DEA or other law enforcement agent at the registered location. Electronic copies of prescription	AC	10			AC= date record was ordered, date record was created, or date prescription filled, whichever is later		URRS-188	21 CFR 1304.04 Health and Safety Code Section 481.075(i)(2) Health and Safety Code Section 483.023 37 TAC 13.207



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MEDREC17	16.1.034	Psychological and Psychiatric Case Records	This series documents all clients who are provided psychological and psychiatric services by the institution's counseling center. Clinicians provide treatment concerning personal problems, academic concerns, and career concerns. The psychiatric consultant provides psychiatric care to some student clients. Records may include: extensive notes made by providers concerning the assessment, diagnosis, treatment and contacts (written, telephone, or in person) with each client; referral letters; release of information agreements; letters to agencies or others concerning the clients; and related documentation.	AC	10			AC= last contact with client		URRS-181	Health and Safety Code Section 241.103 22 TAC 165.1(b)



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MEDREC18	16.1.035	Quality Assurance Records for Health Services	This series documents the setting of measurable standards and procedures for health systems and professional quality by professionals on staff. This series may include but is not limited to: documentation of equipment monitoring, checks of quality control items, and any necessary corrections; reports by the staff; quality assurance committee notes; Morbidity & Mortality (M&M) conferences for residents, staff reviews and related correspondence.	FE	3					URRS-485	



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MEDREC1 9	16.1.038	Medical Source Data	This records series includes health information stored in any original media. Examples of Source Data include, but are not limited to, paper diagnostic tests or tools, x-rays, videotapes, ultrasounds, fetal monitor strips, photographs (either conventional photos or digital images), EKG strips, and ancillary or supporting systems (e.g. pharmacy information systems and radiation oncology information systems). The medical record must contain a written interpretation of all Source Data. Source Data is distinct from the written interpretations of significant clinical information that has been forwarded to the medical record.	AC	10			AC= last date of treatment or patient is 21 whichever is later		URRS-182	22 TC 165.1(b) 42 CFR 482.26(d)(2)
MEDREC2 2	16.1.041	Surgical Instrument Sterilization Records	This series documents the sterilization of surgical instruments used by the health institution. This series may include but is not limited to: autoclave recording charts and log sheets indicating date; load number; items sterilized; and temperature/time settings.		3					URRS-183	



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MEDREC23	16.1.008	Student Counseling Records		AC	10			AC= last contact with student			
MINS1	1.1.060	Audiovisual Recordings of Open Meetings		AC			90	AC= approval of minutes			
MINS2	1.1.059	Meetings, Agendas or Recordings of Closed Meetings or Audiovisual Recordings of Closed	Agendas, minutes, or audiovisual recordings of closed meetings of state boards, commissions, committees, and councils.	AC	2			AC= The date of the meeting or completion of pending action involving the meeting, whichever is later.		See caution comment at RSIN 1.1.058.	Government Code, 551.104(a).



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MINS3	1.1.058	Open Meetings Agendas 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	<p>ARCHIVES NOTE: Agency retains permanent record copy. The archival requirement will be met by sending a copy to the Archives and Information Services Division, Texas State Library and Archives Commission.</p> <p>CAUTION: This records series and RSIN 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.</p>	



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MINS4	1.1.062	Meetings - Supporting Documentation	Documents submitted at meetings of state boards, commissions, committees, and councils, including exhibit items, documentation for agenda items, public comment forms, etc. Includes documents sent in advance of meetings for briefing purposes, some of which may not be submitted at an actual meeting.		2						See caution comment at RSIN 1.1.058.
MINS5	1.1.061	Meeting Notes	Notes taken during open meetings	AC			90	AC= approval of formal minutes			



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MINS6	1.1	University Committee Records	This series documents the activities of standing and ad hoc committees and councils made up of members from a variety of units. The committees are charged with formulating and recommending institutional policies and procedures, establishing standards and requirements, performing an advisory function, or reviewing petitions, appeals, and deviations from policy. Types of committees include administrative committees (those appointed by an administrator) and faculty senate committees (those created by the faculty senate's executive committee). They may function as steering committees, activities committees, standards committees, planning committees, academic committees, awards committees, councils, etc. Committees may be chaired by the director of a specific unit or rotate to different chairs on a regular basis. This series may include but is not limited to: agendas; meeting minutes; reports; notes; working papers; and related documentation and correspondence. CAUTION: Federal or state regulations may		3				O	URRS-23	





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MINS7	1.1	External Committee Records	Documentation of the relationship and participation of institutional units in external professional and educational associations and other organizations	AC				AC= termination of service on committee or termination of committee		URRS-24	
MINS8	1.1.063	Staff Meeting Minutes			1				O		
PARK1	16.3.039	Parking Citation Records	This series documents the regulation of on-campus parking. This series may include but is not limited to: citations; appeal petitions; and related documentation and correspondence.	AC	3			AC= resolution		URRS-235	
PARK2	16.3.040	Parking Permit Records	This series documents the issuance of permits for on-campus parking. This series may include but is not limited to: annual permit cards; temporary permits; parking permits reports; and related documentation and correspondence.	AC	3			AC= superseded or permit is expired		URRS-234	
PAY1	3.2	Pay Plan		US							
PAY2	3.2.009	State Deferred Compensation	Records documenting the amount of pension or deferred compensation earned by individual employees.	AC	5			AC= closing of account			



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PAY3	3.4.006	Time and Attendance Records	Records documenting individual employee's hours worked, including work schedules and documentation evidencing adherence to or deviation from normal hours for those employees working on fixed schedules.	FE	4						40 TAC 815.106(i)
PAY4	12.3.001	Time Cards and Time Sheets - Work-Study Students	This series documents hours worked by work-study student employees. The series is used for payroll purposes and to meet federal requirements for documenting time worked by work-study students. This series may include but is not limited to: Work-Study Time Certificates; referrals; time cards; and time sheets.	AC	3			AC= end of award year for which the aid was awarded and disbursed		See RRS 3.4.006 for all other time cards and time sheets, including those of non-work-study student employees. URRS-67	34 CFR 668.24(e)(1), 34 CFR 675.19(b)
PAY6	3.3.022	UCI-TWC (Texas Workforce Commission) Quarterly Report		AC	2			AC= superseded or termination of employment			
PAY7	3.2	Wage Verifications for Government Agencies		FE	3						
PAY8	4.8.001	Work Study Billing Reconciliation		FE	3						



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PAY9	3.2.007	Unemployment Compensation Records	Records and documentation relating to unemployment compensation claims, including reimbursement of funds disbursed by Texas Workforce Commission (TWC).	AC	5			AC= Resolution of the claim.			
PAY10	3.2.008	Direct Deposit Forms	Forms used to deposit employee's earnings into a specified personal account.	AC				AC= Until superseded, cancelled, or last payment deposited after termination of employment, whichever applicable.			
PD1	16.3.003	Bicycle Registration Records	This series documents the registration of bicycles on campus. This series includes registrations completed by institution students, faculty, and staff for use of bicycles on campus. Information on the cards includes: owner/user names; addresses; telephone numbers; bicycle frame serial numbers; bicycle models; and permit numbers.	AC				AC= date of expiration or when there is no longer any administrative value		URRS-237	
PD2		Calls for Service			3						
PD3		Certified Letter File		FE	3						
PD4	16.3.051	Criminal Trespass Warnings			2					PS4150-09	



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PD5	16.3.018	Dispatch Reports	Record created by dispatcher on each call for service documenting the dispatch of a campus police officer to investigate a disturbance or possible crime on the institution's campus. Includes date and time call received, nature of call, and details of action taken in response to call.		2				O	URRS-230	
PD6	16.3.021	Emergency Protective Orders - Issued Pursuant to Code of Criminal Procedures	Emergency protective orders issued by magistrates pursuant to Article 17.292(a), (b)(1), or (b)(2), Code of Criminal Procedure. This series is for protective orders issued on the magistrate's own motion or on the request of the victim of the offense, the guardian of the victim, a peace officer, or the attorney representing the state; or a protective order issued after the arrest for an offense involving family violence, if the offense involved serious bodily injury to the victim or in which the arrest is for an offense that involved the use or exhibition of a deadly weapon during the commission of an assault.	AC				AC= while the order is in effect		URRS-434	Code of Criminal Procedure Article 17.292(j)



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PD7	16.3.042	Police Activity Logs or Dockets	Logs or equivalent records, usually arranged chronologically or by case, court, or citation number, providing summary data on complaints investigated by law enforcement officers, arrests made, citations issued, accidents investigated, court arraignments, court appearances by officers, and similar activities relating to the arrest or citation of persons or the investigation of offenses.		2				O	ARCHIVES NOTE: Archival review required only if logs or dockets are kept in a bound volume.	
PD8	16.3.008	Chemical Breath Test Records	Logs, test records, operational check lists, and similar records relating to the administration of chemical breath tests.		2					URRS-424	
PD11		FCC Regulations		FE	3						
PD12		Juvenile Records		AC				AC=age of majority			
PD13	16.3.009	Child Abuse Reports	Copies of child abuse reports received by a law enforcement agency pursuant to Family Code, Sections 261.103 and 261.105, which do not become part of arrest and offense investigation records		3					URRS-417	



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PD14	16.3.011	Clery Act Reporting - Daily Crime Log	A written, easily understood crime log that records the nature, date, time, general location, and disposition (if known) of crimes investigated by campus police. (Arrest and disciplinary referrals must be disclosed separately from criminal offenses, hate crimes, and VAWA offenses (instances of domestic/dating violence and stalking).		7					URRS-224	20 USC 1092(f) 34 CFR 668.46
PD15	16.3.012	Clery Act Reporting - Crime Statistics	Statistics on criminal homicide; sex offenses; robbery; aggravated assault; burglary; motor vehicle theft; arson; and arrests for liquor law violations, drug law violations and illegal weapons possession. Includes crimes occurring on campus, in or on non-campus buildings or property, and on public property as defined by 34 CFR, Section 668.46(a) (the Clery Act)..		3				O	URRS-225	20 USC 1092(f) 34 CFR 668.46
PD16	16.3.014	Communication Logs	Records of internal communications including telephone and radio logs				30			URRS-445	



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PD17	16.3.015	Criminal Intelligence and Analysis Files	Information compiled by a law enforcement agency pursuant to Chapter 61, Code of Criminal Procedure, concerning criminal combinations or criminal street gangs must be destroyed after 3 years if: (1) the information relates to the investigation or prosecution of criminal activity engaged in by an individual other than a child; and (2) the individual to whom the information relates has not been charged with criminal activity. In determining whether information is required to be removed, the three-year period does not include any period during which the individual who is the subject of the information is confined in the institutional division or the state jail division of the Texas Department of Criminal Justice.. Records created and maintained to anticipate, prevent, or monitor possible criminal activity, including crime pattern, crime analysis, and modus operandi reports; forecasts; evaluation reports; investigation recommendations; reports on movements of known offenders; information on confidential informants; and messages and	AV						URRS-425	Code of Criminal Procedure Article 61.06(b)



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PD18		National Crime Information Center Activity			1						
PD20	16.3.027	Incident Reports			3						20 U.S.C. 1092(f).
PD21	16.3.035	Offense Records - Class A and B Misdemeanors and State Jail Felonies	Records of cases not cleared must be retained until the statute of limitations has expired. Cases cleared by the conviction or acquittal of the person arrested or cited, by the dismissal of charges against the person, or by the entry on the record of a court by a prosecuting attorney of a nolle prosequi. Includes offense and supplemental offense reports; investigation reports and notes; witness statements; latent fingerprints; results of chemical analysis and polygraph tests; crime scene, mug shot, and other photographs; laboratory reports; 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.		2					CAUTION: Records of cases not cleared must be retained until the statute of limitations has expired.  NOTE: Records may be destroyed upon the death of the individual, if known.	





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PD22	16.3.036	Offense Records - Class C Misdemeanors	Arrest reports and citations for Class C misdemeanors and unclassified violations of state law or local ordinance punishable by fine only, such as Minor in Possession (MIP), Minor in Consumption, and possession of drug paraphernalia.			6				URRS-389	



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PD23	16.3.037	Offense Records - First-Degree and Capital Felonies	Records of cases not cleared must be retained until the statute of limitations has expired. Cases cleared by the conviction or acquittal of the person arrested or cited, by the dismissal of charges against the person, or by the entry on the record of a court by a prosecuting attorney of a nolle prosequi. Includes offense and supplemental offense reports; investigation reports and notes; witness statements; latent fingerprints; results of chemical analysis and polygraph tests; crime scene, mug shot, and other photographs; laboratory reports; 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.		50					CAUTION: Records of cases not cleared must be retained until the statute of limitations has expired.  NOTE: Records may be destroyed upon the death of the individual, if known.	



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					Years	Months	Days				
PD24	16.3.038	Offense Records - Second and Third-Degree Felonies and DWI Offenses	Records of cases not cleared must be retained until the statute of limitations has expired. Cases cleared by the conviction or acquittal of the person arrested or cited, by the dismissal of charges against the person, or by the entry on the record of a court by a prosecuting attorney of a nolle prosequi. Includes offense and supplemental offense reports; investigation reports and notes; witness statements; latent fingerprints; results of chemical analysis and polygraph tests; crime scene, mug shot, and other photographs; laboratory reports; 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		10					CAUTION: Records of cases not cleared must be retained until the statute of limitations has expired.  NOTE: Records may be destroyed upon the death of the individual, if known.	
PD25	16.3.041	Pawn Shop Tickets	Information supplied by pawn shops and sent to law enforcement. Includes individual receipts or lists of items pawned with corresponding serial numbers (as applicable).	AV						URRS-428	



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PD26	16.3.043	Police Animal Records	Records concerning horses, dogs, or other animals utilized by campus police, including records of the acquisition of the animal, its registration and pedigree papers (if applicable), records of training, and its veterinary history.	AC	2			AC= retirement or sale of animal		URRS-399	
PD27		Annual Uniform Crime Reports		PM					O		
PD28		Monthly Uniform Crime Reports			3						
PD29		Vehicle Impound Records		AC	3			AC= end of fiscal year of return or disposal of property			
PD30	16.3.001	Antenna and Transmitter Documentation	Records documenting the monitoring, inspection, measurement, repair, and illumination of antenna, antenna supporting structures, and transmitters authorized to operate with a power output in excess of two watts		1					URRS- 500	47 CFR 90.447



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PD31	16.3.002	Arrest Reports	Arrest report and fingerprints on each person arrested and charged with a felony or a misdemeanor not punishable by fine only. Report includes the name (including aliases), date of birth, and physical description of the offender; the name of the arresting agency; the arrest charge and whether it is a felony or a misdemeanor; the date of arrest; and the date and exact disposition of the case by the agency.	AC				AC= death of individual or 75 years whichever is later		See URRS 16.3.036 for Class C misdemeanors or other violations punishable by fine only.  CAUTION: If the arrest report does not provide the information listed in the record description, documents from offense investigation records, see URRS 16.3.035, enough to provide the information must be retained 75 years or until date of death of the individual.	
PD32	16.3.016	Daily Bulletins	Routine informational communication for officers and personnel on duty, issued daily (or as often as needed). Content may include the Daily Blotter, Daily Crime and Fire Log, and/or "be on the lookout for" (BOLO) notifications. May also include weather advisories for officers.		1					URRS-395	
PD33	16.3.017	Death in Custody Reports	Copies of reports submitted by the director of a law enforcement agency to the Attorney General concerning the deaths of persons while in the custody of a peace officer.		3					URRS-418	



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PD34	16.3.022	Dating and Family Violence Reports	Dating and family violence reports that do not become a part of arrest or offense investigation records. Includes reports of violence between roommates.		3					URRS-419	
PD35	16.3.023	Field Interrogation Reports	Reports on persons stopped and interrogated in the field because of suspicious behavior.	AV						URRS- 420	
PD36	16.3.024	Fingerprint Records	Fingerprint records maintained in paper or on automated systems of missing persons, suspects, known offenders, incarcerated persons,	AV						Fingerprint records of persons arrested for offenses other than Class C misdemeanors must be retained 75 years or until date of death of individual, if known by the arresting agency. See URRS 16.3.002.  For fingerprints collected during an investigation, see URRS 16.3.035, URRS 16.3.038, and URRS 16.3.037.	



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PD37	16.3.026	GPS Tracking Records	Global Positioning System (GPS) data used to track locations of police vehicles.				30			CAUTION: If the GPS data is used to establish the location of a police vehicle as part of an investigation, SEE investigation case file.  The disposal or overwriting of GPS data need not be documented through destruction authorizations, see RRS 1.2.001, or in records disposition logs, see RRS 1.2.010.	
PD38	16.3.027	Campus Security and Incident Reports	Reports concerning suspicious incidents or complaints that, after investigation, did not appear to have involved the commission of a crime. Records may include: incident reports containing names, dates, case numbers, dollar values, locations, descriptions of incident, and personnel taking report; identification cards created when reports of suspicious behavior are made to the office; warnings records; notes; and related documentation. Information may be exempt from public disclosure		3					URRS-228	20 USC 1092(f)



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PD39	16.3.028	Law Enforcement Information Dissemination, Inquiry, and Receipt Records	Reports, logs, and other records pertinent to documenting the dissemination and receipt of criminal histories and dissemination of other information to law enforcement or other agencies through crime information networks (e.g., TCIC, NCIC). Includes records of the dissemination of information other than criminal histories (e.g., missing persons, stolen property) and records of inquiries for and the receipt of information, including criminal histories.	AV						CAUTION: Departments other than campus law enforcement see RRS 3.1.026 for criminal history checks.	
PD40	16.3.029	Internal Affairs Investigation Records - Death/Injury	Records documenting the initiation, investigation, and disposition of internal affairs investigations of alleged misconduct by law enforcement officers. Includes records of investigation of law enforcement shooting incidents which result in death or injury to any person, including a police officer.	PM					O	URRS-407	





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PD41	16.3.030	Internal Affairs Investigation Records - Formal Discipline	Records documenting the initiation, investigation, and disposition of internal affairs investigations of alleged misconduct by law enforcement officers. Includes records of investigations that result in sustained formal discipline (i.e., disciplinary action at or above the level of a written reprimand).	AC	15			AC= completion of investigation		URRS-408	
PD42	16.3.031	Internal Affairs Investigation Records - Informal Discipline/ Inconclusive	A 1-year infraction-free period must precede the date of destruction. Records documenting the initiation, investigation, and disposition of internal affairs investigations of alleged misconduct by law enforcement officers. Includes records of investigations that result in sustained informal discipline (i.e., disciplinary action below the level of a written reprimand) or of investigations whose findings are inconclusive.	AC	5			AC= completion of investigation		CAUTION NOTE: A 1-year infraction-free period must precede the date of destruction	



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PD43	16.3.032	Internal Affairs Investigation Records - Unfounded/Not Sustained	Records documenting the initiation, investigation, and disposition of internal affairs investigations of alleged misconduct by law enforcement officers. Includes records of investigations whose findings are not sustained, or in cases where accusations are determined to be unfounded or the accused is exonerated.	AC	3			AC= completion of investigation		A 1-year infraction-free period must precede the date of destruction.	
PD44	16.3.033	Missing and Unidentified Persons Files	Reports on missing children and adults, requests for investigation, photographs, fingerprints, dental records, x-rays, notifications of possible match, and similar documents relating to the location of missing children and adults, including similar records relating to unidentified bodies	AC	3			AC= date person located or body identified		URRS- 422	
PD45	16.3.034	Mug Shots	Photographs of known offenders used by crime victims or witnesses for identification.	AV						URRS- 427	



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PD46	16.3.044	Police Audiovisual Records - Class C/Not Charged	Audiovisual records, including those from police vehicles, body cameras, or digital cameras, of persons detained for possible DWI or other violations, including recordings of persons on whom either a Class C misdemeanor charge is filed or on whom no charges are filed.	AC			90	AC= date of stop		CAUTION: A recording created with a body worn camera and documenting an incident that involves the use of deadly force by a peace officer or that is otherwise related to an administrative or criminal investigation of an officer may not be deleted, destroyed, or released to the public until all criminal matters have been finally adjudicated and all related administrative investigations have concluded.  The disposal of police audiovisual recordings need not be documented on a disposition log, but institutions should establish procedures governing disposal of these records as part of its records management plan.	Code of Criminal Procedures Article 2.135-2(b)



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PD47	16.3.045	Police Audiovisual Recordings- Offense Greater than Class C	Audiovisual recordings, including those from police vehicles, body worn cameras, or digital cameras, of persons detained for possible DWI or other violations. Includes recordings for offenses greater than Class C misdemeanors	AC				AC= 30 days after entry of final judgement or 90 days after stop whichever is later		CAUTION: A recording created with a body worn camera and documenting an incident that involves the use of deadly force by a peace officer or that is otherwise related to an administrative or criminal investigation of an officer may not be deleted, destroyed, or released to the public until all criminal matters have been finally adjudicated and all related administrative investigations have concluded.  The disposal of police audiovisual recordings need not be documented on a disposition log, but institutions should establish procedures governing disposal of these records as part of its records management plan	Code of Criminal Procedures Article 2.135-2(b)
PD48	16.3.046	Polygraph Examination Records	Polygraph charts, question sheets, reports of examination results, data sheets, films, audio and video of examinations, opinions from the examiner from chart analysis, and other records pertinent to a polygraph examination		2					URRS-429	



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PD49	16.3.047	Rap Sheets	Copies of rap sheets received from the Texas Department of Public Safety or other law enforcement agencies.	AV						URRS-416	
PD50	16.3.048	Special Watch Reports	Informational forms or lists provided to officers for campus areas, buildings, or residences needing special watch, including requests from the public for such watches.	AV						URRS-430	
PD51	16.3.049	Surveillance Videos	Surveillance videos of buildings, facilities, vehicles, or other state property.	AV						CAUTION: If the surveillance video is needed as part of an investigation it should be retained with the see investigation case file.  The disposal or overwriting of surveillance videos need not be documented through destruction authorizations, see RRS 1.2.001, or in records disposition logs, see RRS 1.2.010.	
PD52	16.3.050	Wanted Persons Files	Records received on persons wanted by other law enforcement agencies.	AV						URRS-431	



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PD53	16.3.051	Warning Citations	Warning citations issued for violations of motor vehicle laws or for those violations of the penal code (e.g., criminal trespass) in which the issuance of warning citations is customary.	AV						URRS-423	
PD54	16.3.052	Weapons Records - Disposition	Records documenting the disposition of police weapons, including but not limited to buy-back programs and trade-ins and upgrades with vendors		3					URRS-403	
PD55	16.3.053	Weapons Records - Inspection and Repair	Records of inspection and repair of weapons	LA						URRS-402	
PD56	16.3.054	Weapons Records - Inventory	Inventories of weapons	US	3					URRS-404	
PD57	16.3.055	Weapons Records - Issuance	Logs for issuing weapons such as guns and lasers to officers	AC	3			AC= return of weapon		URRS-401	
PD58		Unclaimed and Abandoned Personal Property Records	For unclaimed or abandoned personal property (lost and found) or property obtained as evidence or through other law enforcement processes. Disposition may be via sale, return to owner, or other means. These records are to be held for FE + 5 if they serve to document the collection of sales tax due to the State Comptroller of Public Accounts.	AC	10			AC=Date on which property is reportable		PS4175-09 System Policy UTS162 UT	



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PD59	4.5.010	Unclaimed University Property Reports and Documentation	Sufficient records to verify information on unclaimed property previously reported to the State Comptroller showing the name and last known address of the apparent owner of reportable unclaimed property, a brief description of the property, and the balance of each unclaimed account, if appropriate.	AC	10			AC= date on which property is reportable			Texas Property Code Section 74.103(b)
PI1	1.1.021	Public Information Requests - Excepted	Includes all correspondence and documentation relating to requests for records that are exempt under the Public Information Act	AC	2			AC= date of notification that records are exempt			Chapter 552, Texas Government Code
PI2	1.1.020	Public Information Requests - Not Excepted	Includes all correspondence and documentation relating to requests for records that are furnished to the public under Public Information Act	AC	1			AC= date fulfilled			Chapter 552, Texas Government Code



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PI3	1.1.077	Release of Records Documentation	Records that document the release of records or information through any method other than a Public Information Act request or subpoena (including employment verification).	AC				AC= Date records released.		See RSIN 1.1.020 for records released under the Public Information Act. See RSIN 1.1.076 for records produced for a subpoena. See RSIN 1.1.048 for records produced for litigation. CAUTION: Some records releases may require longer retention period. Agencies must determine if longer retention period is required based on any federal or state statutes or regulations that apply to the agency's functions. Agency legal staff should be consulted.	





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A/I – Transfer to State/University Archivist  
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3. Agency Item No.	4. Record Series	5. Record Series Title	6. Description	7. Ret. Code	8.			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
PRES1	11.1.015	Appointed Committees Responsibilities	This series documents the activities of standing and ad hoc committees and councils made up of members from a variety of units. The committees are charged with formulating and recommending institutional policies and procedures, establishing standards and requirements, performing an advisory function, or reviewing petitions, appeals, and deviations from policy. Types of committees include administrative committees (those appointed by an administrator) and faculty senate committees (those created by the faculty senate's executive committee). They may function as steering committees, activities committees, standards committees, planning committees, academic committees, awards committees, councils, etc. This series may include but is not limited to: agendas; meeting minutes; reports; notes; working papers; and related documentation and correspondence.	AC	5			AC= term of appointment	O	URRS-23 CAUTION: Federal or state regulations may require longer retention periods (for example, radiation committee meeting records must be retained permanently). The university must consider any applicable federal or state regulations in establishing a retention period for each committee's records. CAUTION: See URRS 11.1.008 (External Committee Records) for meeting records of external committees.	



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					Years	Months	Days				
PRES3	1.1.011	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		
PROG1	17.1.007	Cooperative Program Records - Administrative	This series documents the institution's participation in cooperative and shared educational or research programs. Such programs may share research facilities and resources or instructional programs such as programs permitting student matriculation at member institutions. This series may include but is not limited to: information on requirements and application procedures; committee minutes; meeting agendas; and memos of interpretation and understanding.	PM					O	URRS-21	



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PROG2		Academic Program Administrative Records	This series documents the daily and routine administration of academic programs of the department or college. This series may include but is not limited to: registration reports; add-drop analyses and reports; course enrollment summaries by class; graduation summaries; majors by class level; international activities; cooperative ventures; summer term classes and enrollment reports; placement information; convenience copies of reports prepared by admissions, registrar's, and other offices; memos; working papers; and related documentation and correspondence		5					URRS-273	



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					Years	Months	Days				
PROG3		Special Academic Programs Records - Policy and Program Development Records	This series documents the administrative activities of special academic programs serving and aiding institution students. Programs documented by this series range from special requirement and certification programs to programs aimed at assisting and encouraging target groups of institution students. Included are the National Student Exchange (NSE) program; English language programs; honors programs; minority scholars programs; minority student recruitment programs; disabled student programs; non-traditional student programs; educational opportunities programs; older than average student programs; Native American science programs; study abroad programs; and other special academic programs. This series may be comprised of policy and program planning and development reports and documentation	PM						URRS-260	



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					Years	Months	Days				
PROG4		Special Academic Programs Records - Working Files	This series documents the administrative activities of special academic programs serving and aiding institution students. Programs documented by this series range from special requirement and certification programs to programs aimed at assisting and encouraging target groups of institution students. Included are the National Student Exchange (NSE) program; English language programs; honors programs; minority scholars programs; minority student recruitment programs; disabled student programs; non-traditional student programs; educational opportunities programs; older than average student programs; Native American science programs; study abroad programs; and other special academic programs. This series may include but is not limited to: program; notes; evaluations of courses, support services, and instructors; program course outlines; tuition payment records; program participation and aid selection records; activity accounting records; working papers; reports; and related documentation and correspondence		7					URRS-259.	



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					Years	Months	Days				
PROG5		Cooperative Program Records - Program Records	This series documents the institution's participation in cooperative and shared educational or research programs. Such programs may share research facilities and resources or instructional programs such as programs permitting student matriculation at member institutions. This series may include but is not limited to: applications and eligibility certificates; working papers; fiscal records; and related documentation and correspondence	AC	7			AC= termination of program or agreement		URRS-20	
PROG6		Online Syllabuses and Curricula Vitae								Must remain available to the public for 2 years after initially posted in accordance with Texas Education Code	TEC 51.977(c) TEC 51.974 (c)



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					Years	Months	Days				
PROG7		Degree Program Proposal, Development and Review Records - Working Files	This series provides a record of planning and discussions relating to the implementation of new undergraduate and advanced degree programs and any major reorganization or changes to established programs. This series may include but is not limited to: working papers; letters of support; review agendas; faculty status reports; and related documentation and correspondence		5					URRS-262.	
PROG8		Degree Program Proposal, Development and Review Records - Final Reports, Minutes, Proposals, and Degree Program Reviews	This series provides a record of planning and discussions relating to the implementation of new undergraduate and advanced degree programs and any major reorganization or changes to established programs. This series may include but is not limited to: final reports; curriculum committee meeting minutes; curriculum proposals; and reviews of individual degree programs by campus and off-campus sources	PM						URRS-263	



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PROG9		Non-University Student Program Administration Records - Policy and Program Development Records	This series documents the administrative activities of special instructional and support programs directed to serve elementary through high school and non-institution students belonging to special, minority, or disadvantaged groups. Examples of programs to which this series applies are Science and Mathematics Investigative Learning Experiences (SMILE), Upward Bound, High School Equivalency, and other special non-institution student programs. This series comprises policy and program planning and development documentation	PM						URRS-265	





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PROG10		Non-University Student Program Administration Records - Working Files	This series documents the administrative activities of special instructional and support programs directed to serve elementary through high school and non-institution students belonging to special, minority, or disadvantaged groups. Examples of programs to which this series applies are Science and Mathematics Investigative Learning Experiences (SMILE), Upward Bound, High School Equivalency, and other special non-institution student programs. This series may include but is not limited to: evaluations of courses, support services, and instructors; program course outlines; tuition payment records; reports; statistical reports; working papers; and related							URRS-264	
PROG11		Approved Academic Centers		PM							
PROG12		Academic Course Reports			5						
PROG13		Academic Program Evaluations			7						
PROG14		Catalog of Courses		PM					I		



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PROG15		Co-op Workshop Records		AV							
PROG16		Curriculum Review			10						
PROV1		Provost Committee Reports			4				O		
PROV2		Membership Requirements (Honor Societies, etc.)		US							
PROV3		President's Convocation for Academic Excellence			5						
PROV4		Request for Approval of Academic Departments		AC	5			AC= Decision to approve or disapprove			
PROV5		Request for Approval of Centers		AC	5			AC= Decision to approve or disapprove			



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					Years	Months	Days				
PUB1	1.3.002	Publication Development Files	Physical and digital development and design files used to create State Publications, including but not limited to background material, copy (drafts), original artwork, photo negatives, prints, flats, etc. This includes all work performed both inside and outside the agency.	AV					O	See RSIN 1.3.001 for final State Publications created from development files. ARCHIVES NOTE: Successive and substantive drafts of major publications may be archival. Major is defined by both the publication's authorship and its impact on Texas and Texans. Original artwork, including photo prints and negatives that have significant value as evidence of agency programs as well as the potential for re-use, may be archival.	
PUB2		Publications Scholarship Files		FE	3						



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					Years	Months	Days				
PUB3	1.3.001	State Publications	One copy of each state publication as defined on page xi of this schedule, except a publication that is subject to a different retention period in this schedule. For example, a meeting agenda (see RSIN 1.1.058) also meets the definition, but it must be retained permanently; RSIN 1.1.004, 1.1.055, 1.1.066, 1.1.068, and 4.5.003, which also meet the definition, are closely associated with the appropriations process and must be retained AC + 6.	AC	2			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, 441.103-441.105). 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.  For additional information and requirements concerning state publications made available to the public through the internet, consult the administrative rules of the Texas State Publications Depository Program of the Texas State Library and Archives Commission (13 TAC §§3.1-3.8).	
PUB4		Chronological News Releases			2				O		
PUB5		Cable Television Files			2						



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					Years	Months	Days				
PUB6	1.1.019	Public Relations Records	News, press releases, or any public relations files maintained or issued by the University. Includes print, electronic, audio, and audiovisual records.		2				O		
RES1		Animal Breeding and Management Records	This series includes records relating to the care, management and breeding of animals for research and teaching purposes. If the research facility has been notified in writing that specified records shall be retained pending completion of an investigation or proceeding, the research facility shall hold those records until their disposition is authorized in writing by the Animal and Plant Health Inspection Service of the United States Department of Agriculture	AC				AC= life of animal or transfer of animal to another institution		7 USC 2131 B 2157 9 CFR 2.35 Public Health Service (PHS) Policy on Humane Care and Use of Laboratory Animals (D.L. 99-158) URRS-279	
RES2		Animal Health Records for species not covered by the Animal Welfare Act and Rodents	Public Health Services Policy on Humane Care and Use of Laboratory Animals; National Research Council of the National Academies Guide for the Care and Use of Laboratory Animals	AC	3			AC= completion or expiration of study			



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					Years	Months	Days				
RES3		Biological Select Agents and Toxins Records	<p>After destroyed or removed from inventory +3 years</p> <p>Records must include but are not limited to: inventories for select biological agents and toxins held in long-term storage, which include: name and characteristics; quantity, date of acquisition and source; storage location; tracking of time of movement and by whom; which agent used, purpose of use, quantity used and by whom. Records also must include: date, sender and recipient for intra-entity transfers; if destroyed, quantity of toxin destroyed, date and by whom; a list of all individuals granted access approval from the Health and Human Services secretary or administrator; information about all entries into areas containing select agents (must include name of individual, name of escort, date and time); written explanations of any discrepancies</p>	AC	3			AC= destroyed or removed from inventory		URRS-489	42 CFR 73.17(c).



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					Years	Months	Days				
RES4		Carcinogenic and Hazardous Compounds Research Use Records-Administrative Records	This series documents grant proposals developed by institutional units which have not been funded. This series may include but is not limited to: supporting statistics; demographic data; draft proposals; suggested revisions; final proposals; and related documentation and correspondence	AC	30			AC= separation of the institutional researcher from the University		URRS-94	29 CFR 1910.1020(d) Health and Safety Code, Section 502.005(d)
RES5		Denied Research Grant Proposal Applications Records	This series documents grant proposals developed by institutional units which have not been funded. This series may include but is not limited to: supporting statistics; demographic data; draft proposals; suggested revisions; final proposals; and related documentation and correspondence	AC	2			AC= date of notification		URRS-295	
RES6		Export Control Documents			5						



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RES7		Institutional Animal Care and Use Committee (IACUC) Records - Committee Records.	This series includes meeting minutes, records of attendance, activities of the Committee, Committee deliberations, records of proposed activities involving animals and proposed significant changes in activities involving animals, and whether IACUC approval was given or withheld, and semiannual IACUC reports and recommendations (including minority views).	AC	3			AC= completion of the activity		URRS-289	9 CFR 2.35
RES8		Institutional Biosafety Committee (RDNA Research) Minutes	This series includes meeting minutes of the Biosafety Committee		5					URRS-291	





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					Years	Months	Days				
RES9		Institutionally Funded Research - Minutes and Final Research Report	This series documents the activities of the institutional councils and boards, which review proposals and make recommendations for awards to faculty for research that is not otherwise supported by organized or directed programs but is designed to lead to other funding sources. Examples of projects funded are pilot research, emergency funding, emerging research opportunities, new research field or new research field for investigator, developing research laboratories, and centrally shared research resources. This series includes meeting minutes and final research reports	PM						URRS-288.	



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RES10		Institutionally Funded Research - Project Funding Review	This series documents the activities of the institutional councils and boards, which review proposals and make recommendations for awards to faculty for research that is not otherwise supported by organized or directed programs but is designed to lead to other funding sources. Examples of projects funded are pilot research, emergency funding, emerging research opportunities, new research field or new research field for investigator, developing research laboratories, and centrally shared research resources. This series may include but is not limited to: project financial reports and funding summaries	FE	3					URRS-287	



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					Years	Months	Days				
RES11		Institutionally Funded Research - Project Review Records	This series documents the activities of the institutional councils and boards, which review proposals and make recommendations for awards to faculty for research that is not otherwise supported by organized or directed programs but is designed to lead to other funding sources. Examples of projects funded are pilot research, emergency funding, emerging research opportunities, new research field or new research field for investigator, developing research laboratories, and centrally shared research resources. This series may include but is not limited to: applicant case files; agendas; notes; working papers; award letters; and applications for research support	AC	5			AC= date of notification		URRS-286	
RES12		Protocols for Research Involving Human or Animal Subjects or DNA		AC	3			AC= completion or expiration of study or until resolution of noncompliance issues			45 CFR 46.115(b) 9 CFR 2.35



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					Years	Months	Days				
RES13		Research, Clinical, and Teaching Drug Inventory Records	This series documents the daily inventory of drugs and controlled substances held by units for clinical, instructional, and research uses. These records include daily shift inventory logs listing descriptions, quantities, and initials of pharmacists conducting the inventories	AC	2					URRS-255	21 CFR 1304.04(a)
RES14		Research Enhancement Proposals		AC	5			AC= term of grant			
RES15		Research Enhancement Reports		FE	3						
RES16		Research Grant Records - Final Research Report	Grants may have individual guidelines for retention. Records must be retained in accordance with guidelines of grant or contract. These records relate to final research reports given to a granting agency or sponsor for grant-funded or sponsored research projects	AC	7			AC= expiration or termination of grant or agreement according to its terms		URRS-287	NIH Guidelines OMB Circular A: 110-53



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					Years	Months	Days				
RES17		Research Grant Records - Working Files	Grants and sponsors may have individual guidelines for retention. Records must be retained in accordance with guidelines of grant or contract. Federal grant records should comply with uniform administrative requirements for grants and cooperative agreement to state and local governments. These records relate to funded research grant proposals, and research activity associated with sponsored or grant-funded projects. Universities should ensure that they are following all university policies as well as sponsor/grant requirements when deciding what kinds of records should be included in this series and when considering intellectual property agreements for these records	AC	7			AC= close of grant		URRS-296	45 CFR 46.115(b) NIH Guidelines OMB Circular A: 110-.53
RES18		Research Proposals		AC				AC= accepted or rejected			



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RES19		Scientific Misconduct Records	This series is used to provide a record of accusations of misconduct brought forward by or against university personnel and affiliates and relating to research projects. These records include: accusation statements; inquiry committee findings; and related correspondence	AC	7			AC= completion of proceeding involving the research misconduct allegation		URRS-278	42 CFR 93.317(b)
RES20		Specimen Collection Records		AV							
RES21		Trademark License Agreement		AC	20			AC= life of agreement			
RES22		Copyright Records	This records series pertains to the form of protection that may be obtained for original works of authorship by a University employee within the scope of his or her employment, including works such as intellectual, artistic, computer software, and literary works. Records may include but are not limited to a copy of the work of authorship itself (e.g., an article, book, computer program) as submitted to the United States Copyright Office and the corresponding copyright application and registration notice	AC				AC= expiration		URRS-301	17 U.S.C.302



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RES23		Intellectual Property Agreements	Includes license agreements, know-how agreements, and other contractual agreements resulting from the licensing of technology or the transfer of intellectual property. Does not include patent records.	AC	7			AC= completion of all terms and extensions of the agreement		URRS-512	
RES24		Patent and Invention Records - Denied or Not Pursued.	This series includes records relating to disclosures or applications for patents that are either not filed or otherwise pursued by the university, or which are denied by the US Patent Office. These patent applications remain confidential unless published by the US Patent Office or an international patent office	AC	7			AC= date of last office action or related correspondence in file		URRS-512	



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RES25		Patent and Invention Records - Patents, Licensing, and Disclosure Records.	This series documents the routine research activities of research projects that are not funded by grants and are not subject to any state or federal guidelines. This series may include details of tests, client names, procedures performed, test results, evaluations, notebooks, binders, spreadsheets, or any other type of journal format, the care and proposed use of animals by the university for research purposes, institutional animal care and use forms, research proposal check-off forms, results of laboratory testing performed on agricultural products, case numbers, genetic trials, disease and pest management testing, and related data and correspondence	AV						URRS-277	
RES26		Experiment Documentation		PM							





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RES27		Unfunded Research Grant Proposal Development Records	This series includes the administrative activities involved in the formulation and deliberations leading to submitting a grant proposal for research project funding. Examples of records include: correspondence and working papers	AV						URRS-298	
RIM1		Authority from State to Dispose of State Records not Listed on Schedule		FE	3						
RIM2	1.2.010	Records Disposition Logs	Logs or similar records listing records disposed of by an agency, which might include records series title, dates of records, and date of disposition.		10					CAUTION: Disposition can mean destroyed or transferred.	
RIM3	1.1.012	Records Inventory Worksheets		US							
RIM4	1.2.014	Records Management Plans	Records management plans and similar records that establish the policies and procedures under which records and information are managed.	US	1						



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RIM5	1.2.005	Records Retention Schedule	A records retention schedule (i.e. form SLR 105) that identifies the records that are created and maintained by an agency, provides the minimum timeframes the records must be retained, and includes instructions for their disposition. This series may include working files and documentation of certification and approval by the Texas State Library and Archives Commission.	US						Original is retained for 50 years by the State and Local Records Management Division, Texas State Library and Archives Commission.	
RIM6	1.2.001	Records Destruction Authorizations	Documents authorizing final disposition of records under a certified records retention schedule. Records may also include destruction authorizations (e.g. form RMD 102) approved by Texas State Library and Archives Commission.	FE	3					CAUTION: If destruction authorizations are maintained as part of RSIN 1.2.010 (Records Disposition Logs), then longer retention period applies.	



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STUREC1		Academic Standing Reports	This series documents student academic standing, including academic deficiency and the status changes of academically deficient students. Records may include: reports containing student names, grade point averages (GPA's), grade point deficiencies, and numbers of previous suspensions and probations; student petitions for re-evaluation; report of student progress toward academic readmission/removal of probation status at other institutions; academic honors and awards; and related documentation and correspondence		3					URRS-130	
STUREC2		Americans with Disabilities Act (ADA) Accommodation Requests	Requests for students participating in the Services to Students with Disabilities (SSD) or similar program, and anyone visiting university facilities. Includes supporting documentation.	AC	3			AC= date of last contact		URRS-246	28 CFR 35.105(c)
STUREC3		UTA Student Volunteer Bylaws and Constitution		US							



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STUREC4		Student Record Amendment Requests	Requests from students to amend student records, notices by an institution of denial or consent to amendments, requests for hearings on denied requests, hearing notices, and written decisions by hearing examiners		2					URRS-164	
STUREC5		Recruitment Records	This series documents effort of the institutional units to recruit students based upon disadvantaged status, academic performance, and other criteria. Records may include but are not limited to: prospects lists; advertisement tearsheets, direct mail pieces, promotional literature, and similar material used to recruit students.		3					URRS-515	



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STUREC6		Recruitment Records - Individual Students	This series documents effort of the institutional units to recruit individual students based upon disadvantaged status, academic performance, and other criteria. Records may include but are not limited to: interview notes, conversation notes, personal information forms and resumes, test scores, photographs, and academic transcripts.	AC				AC= end of application term		URRS-173	
STUREC7		Student Conduct Records/Disciplinary Action Records	This series documents academic dishonesty and conduct violations among students. Records may include but are not limited to: incidents reports; final reports; evidence; notification of allegation; disciplinary reports; informal discussion notes; formal hearing notes; final summary statements; decision statements; appeals documentation; and related documentation and correspondence	AC	7			AC= date file is opened		URRS-303	
STUREC8		Student Nondisclosure Requests	Student request to opt out of directory information disclosure	AC				AC= termination of request		URRS-162	34 CFR 99.37(b)



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STUREC9		Written Student Consents	Written consents for information disclosure from the eligible student or student's parents	AC				AC= termination of waiver		URRS-167	
STUREC10		FERPA Access Policies	Written policies and procedures demonstrating how a district meets the requirements of the Family Educational Rights and Privacy Act of 1974, as amended, and federal rules adopted under the act.	US						URRS-170	
STUREC11		FERPA Access Waiver Records	Waivers of access by students to confidential letters and confidential statements of recommendation and revocations of such waivers	AC				AC= life of the records to which the waiver applies		URRS-166	
STUREC12		FERPA Disclosures	Record of each request for access to and each disclosure of personally identifiable information from the educational records of a student: documentation of requests from and disclosures to any party other than the student, an official of the district for what the district has determined are legitimate educational interests, a party with or without written consent from the student, or a party seeking directory information.	AC				AC= as long as disclosed record is retained		URRS- 168	34 CFR 99.32(a)(2)



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STUREC13		FERPA Protest of Record Statements	Statements by students commenting on contested information in a student record, or stating why he or she disagrees with a university's decision not to amend a record, or both	AC				AC= life of the records containing contested information		URRS-165	34 CFR 99.21(c )(1)
STUREC14		Hazelwood Exemption Reports for THECB and Texas Veterans Commission	These reports are used by the Texas Legislative Board and are thus retained in accordance with legislative appropriation cycle requirements.	AC	6			AC= September 1st of odd-numbered calendar years		URRS-102	
STUREC15		National Student Clearinghouse (NSC) Rosters and Reports	Reports and student information submitted to NSC:	AC	3			AC= information submitted to NSC and verified and reconciled on NSC site			
STUREC16	11.1.001	Veterans' Affairs Certification Records	US Department of Veterans Affairs School Certifying Official Handbook; 38 CFR 21.4209(f) This series documents institutional submission of Certification of Enrollment reports required by the U.S. Department of Veterans Affairs	AC	3			AC= date of last period certified		URRS-361	



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STUREC17		Admission Records - Enrolled/Accepted	Caution: International student academic records must be retained at least 1 year after final notice to Immigration and Naturalization Services. This series documents the application process for individuals seeking admission to the University. Records may include but are not limited to: acceptance letters, applications for admission, entrance exams reports, letters of recommendation, medical records, readmission forms, recruitment materials, test scores, residence classification forms, transcripts from other colleges, transcripts from high school, and related correspondence. International student admissions records also included.	AC	3			AC= graduation or date of last attendance		URRS-108	





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STUREC18		Admission Records - Not Enrolled/Accepted	CAUTION: International student academic records must be retained at least 1 year after final notice to Immigration and Naturalization Service. This series documents the application process for individuals seeking admission to the institution. Records may include but are not limited to: acceptance letters, applications for admission, entrance exam reports, letters of recommendation, medical records, readmission forms, recruitment materials, test scores, residency classification forms, transcripts from other colleges, transcripts from high school, and related correspondence	AC	1			AC= end of application term		URRS-109	



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STUREC19		Advanced Placement and Credit Records Awarded	Transfer credit evaluations, national or state standardized test scores and reports (e.g., CLEP, AP, Departmental, IB, SAT II), credit by examination authorizations and reports, military course documentation (e.g., DSST, USAFI) and evaluations, non-traditional transcripts and credentials, life experience records, requests for advanced credit, and similar documentation used by a university to evaluate and determine award of credit by advanced placement	AC	3			AC= graduation or date of last attendance		URRS-355	



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STUREC20		Advanced Placement and Credit Records Not Awarded	Transfer credit evaluations, national or state standardized test scores and reports (e.g., LEP, AP Departmental, IB, SAT II), credit by examination authorizations and reports, military course documentation (e.g., DSST, USAFI) and evaluations, non-traditional transcripts and credentials, life experience records, requests for advanced credit, and similar documentation used by a university to evaluate and determine award of credit by advanced placement	AC	1			AC= end of academic year		URRS-358	
STUREC21		Applications for Admission to Program - Enrolled/Accepted	This series includes applications for admission to programs with admissions requirements separate and beyond those of the institution	AC	2			AC= student separation from the University or department		URRS- 102	
STUREC22		Applications for Admission to Program - Not Enrolled/Denied	This series includes applications for admission to programs with admissions requirements separate and beyond those of the institution	AC	1			AC= end of application term		URRS-101	
STUREC23	15.2.014	Graduation - Applications	Student applications for graduation.	AC	5			AC= graduation or date of last attendance		URRS-353	



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STUREC25		Departmental Student Files	CAUTION: International student academic records must be retained at least 1 year after final notice to Immigration and Naturalization Service. This series provides up-to-date information on student's activity from point of enrollment to graduation or date of last attendance. Information may include personal data, activity reports, graduate student qualifying examinations, copies of placement tests, copies of partial transcripts, correspondence, evidence of graduation or last date of attendance, and related information.	AC	5			AC=student separation from department or the University		URRS-112	
STUREC27		Independent Study Records	This series documents departmental approval for students to enroll in independent study courses. Records may include but are not limited to: permission sheets with students' names; course names; number of credits; and faculty signatures	AC	2			AC= student separation from department or the University		URRS- 125	



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STUREC28		Non-Institution Student Records	This series documents and tracks the application, selection, and progress in special instructional programs of elementary through high school and non-institution students belonging to special, minority, or disadvantaged groups. Examples of programs to which this series applies are Science and Mathematics Investigative Learning Experiences (SMILE), Upward Bound, High School Equivalency, and other non-institution programs. Records may include but are not limited to: application and admission documentation; personal and family information; medical and health documentation; selection and decision making documentation; Educational Opportunity Program (EOP) documentation; notification of admission and non-admission; recommendations and evaluative materials; copies of academic records; counseling and advising notes and documentation; housing and conduct documentation; federal student aid reports; risk release and insurance forms; immigration and citizenship documentation; financial responsibility	AC	3			AC= student separation from program		URRS-299	



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STUREC29		International Student Records - Enrolled/Accepted	CAUTION: Must be retained at least 1 year after final notice to Immigration and Naturalization Service 8 CFR 214.3(g), 22 CFR. This series documents nonacademic institution assistance to international students who have been admitted to academic programs. These records primarily concern institution admissions, immigration issues, and other nonacademic matters. Records may include but are not limited to: copies of visas; scholarship information; institution admissions forms; graduate school applications; transcripts of previous college work; grade reports of prior college work; grade reports from institutional courses; international student advisors' notes; degree completion certificates; explanations for student withdrawals; recommendations and evaluations of students; and related documentation and correspondence	AC	3			AC= graduation or date of last attendance		URRS-180	8 CFR 214.3(g)



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STUREC30		International Student Records - Not Enrolled/Denied	This series documents institution assistance to international students who are considering attendance at the institution. Records may include but are not limited to: letters of inquiry from prospective students; official replies to inquiries; completed applications and admittance forms; local data sheets; advisory notes; and related documentation and correspondence		2					URRS-105	
STUREC31		Internship Applications Not Enrolled/Denied	Applications for internships programs for which student was denied or did not enroll	AC	1			AC= end of academic term in which internship occurred		URRS-386	



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					Years	Months	Days				
STUREC32		Internship Program Records	This series is used to provide a record of the administration of student internship, practicum and cooperative education programs. Programs may be within the institution or off campus and for class credit and/or pay. Records may include but are not limited to: applications for internships inside and external to the institution; agreements with departments; postings/notices; student resumes; transcripts; copies of contracts; proposed institution listings; notes; and related documentation and correspondence	AC	5			AC= end of academic term in which internship occurred		URRS-124	
STUREC33		In Absentia Registration Forms		AC	1			AC= end of semester			
STUREC34		Institutional Student Information Records		AC	5			AC= graduation or last attended			





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STUREC35		Name Change Records (Students and Applicants)	This series documents student or applicant name changes reported to the admissions or registrar's offices by students. Records may include but are not limited to: letters requesting change in name; name change authorizations; and related documentation and correspondence. Does not include change of address, ,race/ethnicity, and other demographic data. )	AV						URRS-123	
STUREC36		Personal Data Update Records (Students and Applicants)	Change of address forms, race/ethnicity questionnaires, requests and authorizations to change other demographic data, and similar source documentation used to update personal data information on transcripts or other student records	AC	1			AC= date of change		URRS-356	
STUREC37		Readmission Applications for Applicants who DO Enter		AC	5			AC= graduation or last attended			



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STUREC38		Residence Affidavits and Documentation	Not for residency classification forms submitted by applicants as part of the admissions process. Texas Education Code §54.052. This series documents declarations filed by students regarding state residency status which is critical for determining tuition status. Records may include but are not limited to: affidavits; correspondence regarding residency; and related documentation	AC	6			AC= date of submission		URRS-103	Texas Education Code 54.052
STUREC39		Tuition Rebate Documentation	Includes tuition rebate form and any supporting documentation pertaining to college tuition rebate program under Texas Education Code Sec. 54.0065	AC	5			AC= graduation or last attended		URRS-137	Texas Education Code 54.0065
STUREC40		Tuition Exemption and Remission and Waiver Records	Applications for and supporting documentation evidencing the grant of tuition exemptions, waivers or remissions. This series may include but is not limited to: authorizations; reconciled lists; account summaries; and related documentation.	AC	3			AC= end of award year		URRS-156	
STUREC41		Residence Forms for Applicants who DO Enter		AC	5			AC= graduation or last attended			



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STUREC42		Society Rosters			5						
STUREC43		Student Activities Board Bylaws and Constitution		US							
STUREC44		Student Congress Resolutions		PM					O		
STUREC46		Student Certificate Records - Academic	CAUTION: Transcript notes regarding academic certifications awarded are maintained permanently by the Registrar. This series documents student completion of certificate programs offered by university academic programs	AC	5			AC= graduation or last attendance		URRS-352	



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STUREC47		Student Certificate Records - Professional	CAUTION: Accrediting agencies may require longer retention periods for professional certification records. Refer to accrediting agency to determine the term of the certification period. This series documents the preparation of students earning degrees and/or certification for licenses or certificates to enter a profession (e.g., teaching certificates) and forms the basis of the initial certification by external entities for various professions. Records may include: applications for admission to a program; registration for practicum hours and evidence of the completion of the practicum; transcripts; narrative evaluations on practicum; notice of completion of hours required for certification; recommendations and evaluations; and related correspondence.	AC	1			AC= end of certification period		URRS-129	



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STUREC48		Student Coursework	CAUTION: Coursework under dispute may not be destroyed until the resolution of the dispute. This series documents student subject mastery in institution courses. Records may include but are not limited to: examinations and answers; quizzes and answers; homework assignments; course papers; term papers; and essay assignments	AC	1			AC= end of academic year		URRS-127	
STUREC49		Student Election Records					60				
STUREC50		Student Leave of Absence			2						
STUREC51		Student Travel Forms		FE	4						
STUREC52		Sponsored Student Files		FE	3						
STUREC53		Student Organization Records		AV					O		



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STUREC54		Student Transcripts	Transcript, or a record equivalent in function, of the academic achievement of each enrolled student, documenting courses taken, credits granted, grades received, and any degrees or certifications awarded (including any narrative assessments or evaluations prepared in lieu of an assigned grade).	PM						URRS-122	
STUREC55		Student Transcript Requests	Requests for transcripts to be provided to student or sent to other institutions or authorized entities.	AC	1			AC= submitted			
STUREC57		Transfer of Credit Evaluations		AC	5			AC= Graduation or last attended			
STUREC59		Valedictorian Certificates		AC	3			AC= audit			



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STUREC61		Student Grievance Records	If a grievance brought forward by students against the institution becomes part of litigation, it should be retained as a litigation record. If the grievance goes to the university ombudsman, then the records should be retained as an ombudsman record. This series documents grievance brought forward by students against the institutions which do not result in litigation. Grievances may pertain to academic issues; housing; affirmative action and equal opportunity; student conduct; and other issues. Records include: notices of grievance; informal discussion notes; grievance responses; formal hearing notes (including audio tapes); final summary statements; settlement agreements; appeals documentation; and related records. Portions of these records may be exempt from public disclosure. (Student Conduct records retention 7 years to comply with Clery Act)	AC	7			AC= graduation or last attended		URRS-304	



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STUREC62		Behavior Intervention Team (BIT) Records		AC				AC= disposition of case plus 5 years unless evidence of violence against the community, then permanent			
STUREC63		Student Discipline Records		AC				AC= disposition of case plus 7 years			
STUREC64		Department of Assistive and Rehabilitative Services for Students (DARS) Contracts		AC	4			AC= term of contract			
STUREC66		Students with Disabilities Records		AC	5			AC= graduation or last attended			
STUREC67		Grade Change Records	This series documents changes submitted by instructors through the academic departments to the Registrar.	PM						URRS-118	
STUREC68		Grade Reports (Report Cards)	This series documents grades received by students for the term. This is the record copy of reports distributed to students at the end of each term.	AC	1			AC= date distributed		URRS-126	
STUREC69		Grade Rosters		PM							
STUREC70		Greek Grade Waivers			5						





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STUREC72	15.2.015	Graduation Degree Audit and Authorizations	This series documents student completion of degree requirements, including authorizations certifying completion of degree requirements. The series may include official graduation audit forms that list students' names; colleges; majors; degrees; minors; the breakdown of institutional degree requirements and how the applicants have fulfilled them; grade point averages; deans' recommendations/comments and signatures; and comprehensive examinations	AC	3			AC= graduation or last attendance		URRS-114	
STUREC73	15.2.016	Graduation - Diploma Administration Records	This series includes records of diplomas picked up in person, mailed, and returned.	AC	1			AC= request fulfilled		URRS-114	
STUREC74		Placement Files		AC	1			AC= graduation or last attended			
STUREC75		Withdrawal Forms and Authorizations	Requests and authorizations for a student to withdraw from classes after calendar deadlines without academic penalty for reasons acceptable to the University	AV						URRS-134	
TAX1	3.2	W-2 Forms Returned		AC	4			AC= tax due date, date claim is filed, or date tax is paid, whichever is later			



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TAX2	3.2.003	Federal Tax Records	Includes 1099, W2, FICA, and other tax records.	AC	4			AC= tax due date, date claim is filed, or date tax is paid, whichever is later			26 CFR 31.6001 – 1(e)(2)
TAX3	3.2.005	W-4 Forms	Employer's copy of "Employee's Withholding Exemption Certificate."	AC	4			AC= Until superseded, obsolete, or termination of employment.		Used to make increases or decreases to employees' gross pay, FICA, retirement, or in the computation of taxes.	26 CFR 31.6001-1(e)(2).
TAX5	4.7.013	Federal Tax Information (FTI) Audit Logs	Logs documenting requests and receipt of FTI, including any information created by the recipient that is derived from federal return or return information received from the IRS or obtained through a secondary source.		5						IRS Publication 1075.
TELE1	5.5	Long Distance Authorization Numbers		US							
TELE2	5.5	Long Distance Email		FE	3						
TELE3	5.5	PBX Records		LA	3						
TELE4	5.2.019	Service Calls and Work Orders			1						
TELE5	4.1.001	Telephone Billings		FE	3						



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TELE6	5.5.002	Telephone Activity Records	Telephone logs created for internal documentation purposes; station activity reports of internal listings of incoming/outgoing telephone activity to individual telephone stations; operator call transfers; summary detail reports; and system activity reports of internal listings of all incoming/outgoing agency telephone activity.	AV						See RSIN 4.1.001 for telephone bills.	
TEST1		Faculty Grade Book	Record of students in course and work completed. Includes grade sheets and materials necessary to reconstruct a student's graded performance.	AC	1			AC= expiration of grade appeal period		URRS-110	
TEST2		Original Grade Sheets	This retention period applies to records maintained by the Registrar. These records serve as the basis for a student's official academic record.	PM						URRS-133	
TEST3		Credit by Exam Scores		AC	5			AC= date received			
TEST4		Exams and Tests Contested		AC				AC= resolved			
TEST5		Exams and Tests Uncontested			2						



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TEST6		National Board of Medical Examiners Test Scores	Test scores for medical students. Records may also include test scores from state or local boards or other certifying agencies.	PM						URRS-359	
TEST7		National Exams - Test Administration Records		FE	3						
TEST8		Test Scores for Applicants who DO enter		AC	5			AC= graduation or last attended			

