



STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 753		3. Agency Name SAM HOUSTON STATE UNIVERSITY							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Agency	7. Storage	7. Total	8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
1.1	1	Academic Program Appraisal and Request	AV		AV				
5.4.001	2	Accident Reports and Associated Documentation	CE+5		CE+5		29 CFR 1904.33 – The Texas Workers’ Compensation Commission retains copies of the reports submitted to it for 50 years		
4.7.001	3	Accounting Policies and Procedures Documentation	US+3		US+3				
4.7.001	4	Accounts Payable & Disbursement Information	FE+3		FE+3				
4.4.003	5	Accounts Payable Ledger	FE+3		FE+3				
4.4.002	6	Accounts Receivable Ledger	FE+3		FE+3				
4.1	7	Accounts Receivable Records	FE+3		FE+3				
1.1	8	Accreditation Reports	PM		PM	R			

Retention Codes (Field 7)	Archival Codes (Field 8)
AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	A – Transfer to State Archives R – Review by State Archivist
CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months
PM – Permanent	US – Until Superseded



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1.1.056	9	ADA (American with Disabilities Act) Documentation	3		3	28 CFR 35.105©		
3.3.001	10	Affirmative Action Plans	5		5	29 CFR 30.8(e)		
1.1.070	11	Agency Rules, Policies, and Procedures FINAL - Manuals, guidelines, administrative rules, or similar records distributed internally for the use of employees or externally to the public or those individuals or entities regulated by an agency that sets out the rules, policies, and procedures that govern an agency's programs, services, or projects.	AC+3		AC+3	Archival Review required before Disposal AC = Completion or termination of program, rules, policies, or procedures. SEE ALSO Records Series Item Number 1.1.070.		

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1.1.071	12	Agency Rules, Policies, and Procedures WORKING FILES - Working files used in the development of manuals, guidelines, administrative rules, or similar records distributed internally for the use of employees or externally to the public or those individuals or entities regulated by an agency that sets out the rules, policies, and procedures that govern an agency's programs, services, or projects.	AC+3	AC+3	R	Archival Review required before Disposal AC = Completion or termination of program, rules, policies, or procedures. SEE ALSO Records Series Item Number 1.1.070.		
3.3.026	13	Agency Staffing Reports	US+3	US+3				
1.1	14	Alumni Records	PM	PM				
4.5.006	15	Annual Operating Budget	FE+3	FE+3				
	16	Applications for Graduation	AC+1	AC+1		AC=after graduation or date of last attendance.		
3.1.001	17	Applications for Employment - Not Hired	2	2		29 CFR 1602.31		

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Archival Codes (Field 8)

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R – Review by State Archivist



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3.1.002	18	Applications for Employment - Hired	AC+5		AC+5		AC-Termination of employment	
5.2.001	19	Appraisals - Building or Property	AV		AV	R		
3.3.027	20	Aptitude and Skills Tests	US+2		US+2		29 CFR 1602.49	
5.4	21	Arrest Records	PM		PM			
1.1.002	22	Audits	AC+7		AC+7		AC = Publication or release of final audit findings. The State Auditor's Office retains any copies of its audits performed on Texas state agencies.	
4.7.002	23	Bank Statements	FE+3		FE+3		See Note 1	
3.3.004	24	Benefit Plans	US+1		US+1		29 CFR 1627.3 (b)(2)	
5.3.007	25	Bid Documentation - Includes bid requisition/authorizations, invitations to bid or propose, bid specifications, accepted and rejected bids, and bid tabulation/evaluations.	FE+3		FE+3			

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4.1.002	26	Billing Detail	FE+3		FE+3				
5.5.006	27	Billing Detail - Telecommunications (TEX-AN) - In addition to summary detail, includes any accompanying detailed listing of long distance calls. Retention: FE + 3 years. Vital: No. Archival: No. Comments:	FE+3		FE+3		The billing agency will maintain all long distance TEX-AN records and will provide each using agency its bill summary of centralized capitol compiles telephone service without call detail records. For these bill summaries, SEE item number 4.7.011. SEE item number 5.5.001 for billing detail from carriers other than TEX-AN.		
5.2.028	28	Building Construction Contract and Inspection Records	LA +10		LA +10	R	See Also: item numbers 5.2.002 and 5.2.003.		

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5.2.002	29	Building Construction Project Files - Planning, design, and construction records; accepted and rejected bids; correspondence; etc	AC+10		AC+10	R	Retention based on legal requirements to verify safety factors AC=Completion of project See Also: Items numbers 5.2.003 and 5.2.028		
5.2.003	30	Building Plans and Specifications - State Owned	LA		LA	R			
5.2.003	31	Building Plans and Specifications - Leased	AC+2		AC+2		AC=For leased buildings; termination or cancellation of lease See Also: item numbers 5.2.002 and 5.2.028		
5.2.004	32	Building Space Requests	1		1				

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1.1.013	33	Calendars, Appointment Records and Itinerary Records - Calendars, appointment books or programs and scheduling, or itinerary records, purchased with state funds or maintained by staff during business hours that document appointments, itineraries, and other activities of agency officials or employees.	CE+1	CE+1		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.		
4.1.003	34	Cancelled Checks	CE+3	CE+3				
4.6.003	35	Cash Count	FE+3	FE+3				
4.2.001	36	Cash Deposit Voucher (Deposit Summary)	FE+3	FE+3				
4.2.002	37	Cash Receipts (Sundry Sales)	FE+3	FE+3				
5.2.006	38	Certificate of Destruction of Property	FE+3	FE+3				

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5.1.012	39	Charge Schedules - Price Lists	US+3		US+3				
4.7.005	40	Claim Files	AC+3		AC+3		AC=Resolution of claim		
1.1	41	Class Roll Summary	FE+3		FE+3				
1.1	42	Class Schedules	FE+3		FE+3				
1.1	43	Classroom/Course Materials	US		US		Includes notes, transparencies, worksheets, etc.		
4.7	44	College Work-Study Program Payments	FE+5		FE+5		Fed. Reg. 675.19 (C)(2)		
1.1.006	45	Complaint File	AC+2		AC+2		AC=final disposition of complaint Open unless clearly unwarranted invasion of personal privacy		
5.2.008	46	Computer Hardware Maintenance Records	LA+3		LA+3				
2.2.004	47	Computer Job Schedules and Reports	3 mos.		3 mos.				

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2.2.002	48	Computer Utilization Records	FE+3		FE+3	Retain only if the records support long-range plans and studies		
5.1.017	49	Contract Log - List of agency contracts, leases, and agreements including general obligation, land lease, utilities, and construction contracts.	FE+3		FE+3			
5.1.001	50	Contracts and Leases - Contracts, leases, and agreements include general obligation, land lease, utilities, and construction except for buildings. Documents include specifications, affidavits of publication of calls for bids, accepted bids, performance bonds, contracts, purchase orders, inspection reports, and correspondence.	AC+4		AC+4	AC = Expiration or termination of the instrument according to its terms. SEE item number 5.2.028 for building construction contracts and item number 5.1.017 for contract logs.		

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			Agency	Storage	Total				

1.1.007	51	Correspondence - Administrative - 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	3		3	R	CAUTION: This records series and item number 1.1.008 should be used only for correspondence that is not included in or directly related to another records series on the agency's approved schedule. For example, a memorandum that documents an appropriations request must be retained for the minimum retention period prescribed by item number 1.1.004; a letter concerning an audit for that prescribed by item number 1.1.002, etc. SEE ALSO item number 1.1.011.		
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			Agency	Storage	Total				

1.1.008	52	Correspondence - General	1		1				
5.1.015	53	Correspondence Tracking Records	1		1				
3.1.006	54	Counseling Notes	AC+3		AC+3		AC=Graduation or date of last attendance or termination from employment		
1.1	55	Course Outlines and Descriptions (Syllabus)	US+3		US+3				
1.1	56	Curriculum Development Files	5		5				
4.2.003	57	Daily Cash Receipts Log	FE+3		FE+3				
5.2.007	58	Damage Reports	FE+3		FE+3				
1.1	59	Dedications	PM		PM	R			
5.1	60	Deeds and Easements	LA		LA		LA=After property is sold.		
5.1.003	61	Delivery Reports	2		2				

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2. Agency Code	753	3. Agency Name	SAM HOUSTON STATE UNIVERSITY		
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4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
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1.2.001	62	Destruction Authorizations - Agency level documents authorizing final disposition of records under certified records retention schedule.	FE+3		FE+3				
4.7.007	63	Detail Charts of Accounts	F+3		FE+3				
3.2.008	64	Direct Deposit Authorization	US		US				
1.1.010	65	Directives	US+1		US+1				
5.4.013	66	Disaster Preparedness & Recovery Plans	US		US				
1.2.016	67	Disaster Recovery Service Approval Form (RMD 113) Agency copy of Form	AC		AC		AC=Until superseded or termination of service.		
5.5.007	68	Disputed Call Documentation	FE+3		FE+3				
3.1.029	69	Documentation or Verification of Citizenship	AC+3		AC+3		8 CFR 2740.2 AC=Termination of employment		

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3.3.031	70	EEO Reports & Supporting Documentation	AC+2		AC+2	29 CFR 1602.32, 1602.39, 1602.41, 1602.48, and 1602.50. AC=Until superseded or termination of employment		
4.1.008	71	Electronic Fund Transfers. Direct Deposit Registers.	FE+3		FE+3			
3.1.031	72	Employment Benefits - Other than Insurance	AC+2		AC+2	29 CFR 1602.32, 1602.39, 1602.41, 1602.48, and 1602.50.		
3.2.001	73	Employee Deduction Authorization	AC+4		AC+4	AC=After termination of employment or after amendment, expiration, or termination of authorization, whichever sooner.		
3.2.002	74	Employee Earning Records	4		4	40 TAC 815.106(i).		

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3.1.011	75	Employee Insurance Records	AC	AC	AC = Until superseded or termination of employment CAUTION: Documents that serve as payroll deduction authorizations must be maintained for the retention period prescribed for item number 3.2.001.		
3.1.037	76	Employee Recognition Awards	AC+5	AC+5	AC=Termination of employment		
3.1.012	77	Employment Advertisements	2	2	29 CFR 1602.49 (a)		
3.1.013	78	Employment Contracts	AC+4	AC+4	26 CFR 516.5 AC=Expiration or termination of the contract according to it's terms		

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3.1.014	79	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, pre-employment drug screening test results, polygraph examination results; and all other records that document the selection process	2	2	29 CFR 1602.49(a) [State Universities].			
4.1.004	80	Encumbrance Detail	FE+3	FE+3				
4.2.004	81	Encumbrance Voucher	FE+3	FE+3				
5.2.025	82	Equipment Description and Specification	AC+2	AC+2				
5.2.008	83	Equipment History File/Equipment Service Agreement	LA+3	LA+3				
5.2.009	84	Equipment Inventory	FE+3	FE+3				

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5.2.010	85	Equipment Manuals	LA		LA				
5.2.011	86	Equipment Warranties	AC+1		AC+1				
5.2.012	87	Estimate Files (Supply & Repair Cost Estimates)	1		1				
5.4.002	88	Evacuation Plans	US		US				
3.1	89	Evaluations of Faculty by Students	FE+1		FE+1				
1.1.011	90	Executive Orders	US+3		US+3	R			
4.2.007	91	Expenditure Vouchers	FE+3		FE+3				
4.3.003	92	Expenditures Journal Register	FE+3		FE+3				
5.2.026	93	Facilities Reservations Log	2		2				

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4.7.008	94	Federal Grant Records	AC+3		AC+3	<p>AC = Satisfaction of all Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments (the Common Rule).</p> <p>CAUTION: Retention requirements may vary depending on the specific federal funding agency. Agencies must ensure that records are retained for the appropriate retention period.</p>		
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3.2.003	95	Federal Tax Records	AC+4	AC+4		26 CFR 31.6001-1(e)(2) – AC = Tax due date, date the claim is filed, or date tax is paid whichever is later.		
	96	FERPA Documents (Family Education Rights and Privacy Act)	AV	AV		Life of Affected Record		
4.1	97	Financial Aid Fund Accounting Records	FE+5	FE+5				
2.1.011	98	Finding Aides, Indexes and Tracking Systems - automated indexes, lists, registers, and other finding aids used to provide access to records.	AC	AC		AC = The related records have been destroyed Caution: These records must carry the same retention period and archival code of the records they support.		

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4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

4.7	99	Fines Records	AC+3		AC+3	AC=After fine has been paid or dismissed		
4.7.009	100	Fixed Asset Sequential Number Log	US+3		US+3			
	101	Foreign Student Forms	AC+5		AC+5	AC=After graduation or date of last attendance.		
3.3.011	102	Former Employee Verification Records: Minimum information needed to verify employment, includes name, social security number, exact dates of employment, last known address and most recent public access option form.	AC+75		AC+75	AC=Termination of employment		
1.2.004	103	Forms Directory/Inventory/Catalog	US		US			
1.2.003	104	Forms, History Files	AC+1		AC+1	AC=Discontinuance of use of form.		
5.3.002	105	Freight Bills Paid	FE+3		FE+3			
5.3.003	106	Freight Claims	AC+2		AC+2	AC=Resolution of claim		
4.2.006	107	General Journal Vouchers	FE+3		FE+3			

Retention Codes (Field 7)				Archival Codes (Field 8)	
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives	
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist	



STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 753		3. Agency Name SAM HOUSTON STATE UNIVERSITY							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

4.4.001	108	General Ledgers - Fiscal Records	FE+3		FE+3				
4.7	109	Gift Income Records	PM		PM		Excludes Books		
	110	Graduation Lists	PM		PM				
4.7.008	111	Grant Records - Federal	AC+3		AC+3		<p>AC = Satisfaction of all Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments (the Common Rule).</p> <p>CAUTION: Retention requirements may vary depending on the specific federal funding agency. Agencies must ensure that records are retained for the appropriate retention period.</p>		

Retention Codes (Field 7)	Archival Codes (Field 8)
AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	A – Transfer to State Archives R – Review by State Archivist
CE – Calendar Year End FE – Fiscal Year End	PM – Permanent US – Until Superseded
LA – Life of Asset MO – Months	



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SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 753		3. Agency Name SAM HOUSTON STATE UNIVERSITY							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

4.7	112	Grant Records - State on File	AC+3		AC+3	AC=Receipt of grant applications, reports, information		
3.1.018	113	Grievance Records	AC+2		AC+2	Open unless clearly unwarranted invasion of personal privacy AC=Final decision on the grievance (Does not include complaints filed with the EEO)		

Retention Codes (<i>Field 7</i>)	Archival Codes (<i>Field 8</i>)
AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	A – Transfer to State Archives R – Review by State Archivist
CE – Calendar Year End FE – Fiscal Year End	PM – Permanent US – Until Superseded
LA – Life of Asset MO – Months	



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Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 753		3. Agency Name SAM HOUSTON STATE UNIVERSITY							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				
2.1.008	114	Hardware Documentation: maintenance requirements of computer hardware such as operating manuals, hardware/operating system requirements, hardware configurations, and equipment control systems.	AC		AC		AC = Until electronic records are transferred to and made usable in a new hardware environment or there are no electronic records being retained to meet an approved retention period that require the hardware to be retrieved and read. 13 TAC 6.94. CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.		
5.4.008	115	Hazard Communication Plans	US+5		US+5		Texas, Health and Safety Code, 502.009(g)		

Retention Codes (Field 7)				Archival Codes (Field 8)	
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives	
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist	



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Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 753		3. Agency Name SAM HOUSTON STATE UNIVERSITY							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

5.4.007	116	Hazardous Materials Training records	5		5		Texas, Health and Safety Code, 502.009(g)		
3.2.010	117	Human Resources Information System Reports and Documentation	AC+4		AC+4				
3.2.004	118	Income Adjustment Authorization	2		2		29 CFR 516.6 (c)		
5.4.003	119	Inspection Records	AC+3		AC+3		AC = Inspection, or date of the correction of the deficiency if the inspection report reveals a deficiency.		
5.1.013	120	Insurance Policies	AC+4		AC+4		AC=Expiration or termination of the policy according to its terms.		
1.1.008	121	Inter-Office (General) Correspondence	1		1				
1.1	122	Interlibrary Loan Records	FE+3		FE+3				
4.1.005	123	Inventory and Other Cost Files	FE+3		FE+3				
5.2.016	124	Inventory System Update Listing	AC		AC		AC=Transfer of information into annual listing		

Retention Codes (<i>Field 7</i>)				Archival Codes (<i>Field 8</i>)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist			



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Records Retention Schedule

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2. Agency Code 753		3. Agency Name SAM HOUSTON STATE UNIVERSITY							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

5.2.014	125	Inventory, Annual Physical	FE+3		FE+3				
5.2.015	126	Inventory, Notice of Equipment Removed Form	FE+3		FE+3				
5.4	127	Investigation Record (UPD)	PM		PM				
4.1.006	128	Investment Transaction Files	FE+3		FE+3				
3.3.025	129	Job Procedure Records	US+3		US+3				
3.4.002	130	Leave Status Reports	FE+3		FE+3				
1.1.014	131	Legal Opinions and Advice	AV		AV		From Attorney General		
1.1.004	132	Legislative Appropriations Requests	AC+6		AC+6	A	Archival: A - Transfer to Archives and Information Services Division. AC = September 1 of odd-numbered calendar years.		

Retention Codes (Field 7)	Archival Codes (Field 8)
AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	A – Transfer to State Archives R – Review by State Archivist
CE – Calendar Year End FE – Fiscal Year End	PM – Permanent US – Until Superseded
LA – Life of Asset MO – Months	



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Records Retention Schedule

SLR 105

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2. Agency Code 753		3. Agency Name SAM HOUSTON STATE UNIVERSITY							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

1.1	133	Library Circulation Records	AC		AC		AC=After library materials are returned by the due date.		
2.1	134	Library Online Catalog	US		US				
5.6.004	135	License and Driving Record Check	AC		AC		AC=Until superseded or until termination of employment		
1.1.048	136	Litigation Files	AC+1		AC+1		AC=As applicable, decision of an agency not to file a lawsuit or decision that a lawsuit will not be filed against it on a matter; dismissal of a lawsuit for want of prosecution or on motion of the plaintiff; or final decision of a court (or of a court on appeal, if applicable) in a lawsuit		
5.5.002	137	Long Distance Telephone Logs	AV		AV				
4.7.010	138	Long Term Liability	AC+3		AC+3		AC=retirement of debt		
5.2.017	139	Lost and Stolen Property Reports	FE+3		FE+3				

Retention Codes (Field 7)

AC – After Closed, Terminated, Completed, Expired, Settled
AV – Administrative Value

CE – Calendar Year End
FE – Fiscal Year End

LA – Life of Asset
MO – Months

PM – Permanent
US – Until Superseded

Archival Codes (Field 8)

A – Transfer to State Archives
R – Review by State Archivist



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Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 753		3. Agency Name SAM HOUSTON STATE UNIVERSITY							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

5.1.004	140	Mail and Telecommunications Listings	US		US				
2.1.002	141	Master Files - Relatively long-lived computer files containing organized and consistent sets of complete and accurate electronic records. Examples include, but are not limited to, data tables of relational databases used by applications or computer programs.	AC		AC		AC = Completion of 3rd verification cycle, or audit completion confirming successful transaction updates, or required audit trail maintenance, or the ability to restore or migrate when errors are detected or when hardware or software changes occur.		
5.4.010	142	Material Safety Data Sheets	AC		AC		AC=After sheets are updated or hazardous chemicals is no longer stored.		
5.2.024	143	Material Specifications	AC+2		AC+2		AC=After purchase or material is no longer needed		
5.4	144	Medical Waste Records	FE+5		FE+5				

Retention Codes (Field 7)	Archival Codes (Field 8)
AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	A – Transfer to State Archives R – Review by State Archivist
CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months
	PM – Permanent US – Until Superseded



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Records Retention Schedule

SLR 105

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2. Agency Code 753		3. Agency Name SAM HOUSTON STATE UNIVERSITY							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				
1.1.058	145	Meeting Agenda and Minutes	PM		PM	A	Texas Civil Statutes - Art. 6252-17(2a)(f) 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.		
1.1.063	146	Meeting Minutes and Notes - Departmental - Minutes or notes and supporting documentation	1		1				

Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist			



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Records Retention Schedule

SLR 105

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2. Agency Code 753		3. Agency Name SAM HOUSTON STATE UNIVERSITY							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

1.1.060	147	Meeting Minutes - Audio & Visual Tapes	AC + 90 days	AC + 90 days	AC=After approval of written minutes by the governing body of an agency		
4.6.001	148	Monthly Balancing	FE+3	FE+3			
	149	Name Change Authorizations	AC+5	AC+5	AC=After graduation or date of last attendance.		
5.1.014	150	Office Procedures Manual	US+1	US+1			
5.3.004	151	Order - Acknowledgements	AV	AV			
1.1.023	152	Organization Charts - Original	US	US			
2.2.012	153	Output Records for Computer Production	AV	AV			
5.3.005	154	Packing Slips	AV	AV			
5.6.009	155	Parking Permits	US	US			

Retention Codes (Field 7)	Archival Codes (Field 8)
AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	A – Transfer to State Archives R – Review by State Archivist
CE – Calendar Year End FE – Fiscal Year End	PM – Permanent US – Until Superseded
LA – Life of Asset MO – Months	



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Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 753		3. Agency Name SAM HOUSTON STATE UNIVERSITY							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

	156	Patient Clinical Records	7		7		Pursuant to Texas Admin. Code. Title 22, Part 9, Chpt. 165, Rule 165.1 - Patient medical records have a retention period of 7 years		
3.1.019	157	Performance Appraisals	2		2		29 CFR 1620.32(C) - Open unless clearly unwarranted invasion of personal privacy. Tenure and Post- Tenure documentation can extend over 6 years		
3.1.020	158	Personnel Corrective Action Documentation	AC+5		AC+5		AC=Termination of corrective action. Open unless clearly unwarranted invasion of personal privacy.		
3.1.021	159	Personnel Disciplinary Action Documentation	AC+5		AC+5		AC=Termination of employment		

Retention Codes (Field 7)				Archival Codes (Field 8)	
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives	
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist	



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Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 753		3. Agency Name SAM HOUSTON STATE UNIVERSITY							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

3.1.022	160	Personnel Information or Action Form	2	2		29 CFR 1602.49(a) [State Universities].		
3.1.022	161	Personal Information or Action Forms	75	75		29 CFR 1602.49(a) [State Universities].		
3.3.024	162	Personnel Policies and Procedures	US+3	US+3				
5.1.011	163	Photocopier and Telefax Usage Logs and Reports	AV	AV				
1.1.024	164	Plans and Planning Records	AC+3	AC+3	R	AC=Decision made to implement or not implement result of planning process Archives Note: Data processing planning records are not archival.		
5.5	165	Police Radio Logs	AV	AV				
5.4	166	Police Reports	PM	PM				

Retention Codes (<i>Field 7</i>)	Archival Codes (<i>Field 8</i>)
AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	A – Transfer to State Archives R – Review by State Archivist
CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months
	PM – Permanent US – Until Superseded



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Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 753		3. Agency Name SAM HOUSTON STATE UNIVERSITY							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

1.1.070 & 1.1.071	167	Policy and Procedures Manual	US+3		US+3				
3.1.023	168	Position Job/Descriptions	AC		AC		AC = Until superseded or job eliminated 40 TAC 815.106(i)		
3.3.015	169	Positions/Job Classification Review File	US+3		US+3				
5.1.005	170	Postage Records	FE+3		FE+3				
5.1.012	171	Price Lists/Change Schedules	US+3		US+3				

Retention Codes (Field 7)				Archival Codes (Field 8)	
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives	
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist	



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Records Retention Schedule

SLR 105

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2. Agency Code 753		3. Agency Name SAM HOUSTON STATE UNIVERSITY							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				
2.1.001	172	Processing Files: - Machine-readable files used in the creation, utilization, and updating of master files.	AC		AC		AC = Completion of 3rd verification cycle, or audit completion confirming successful transaction processing, or required audit trail maintenance, or the ability to restore or migrate when errors are detected or when hardware or software changes occur. CAUTION: Records management officers must be certain before assigning the retention period of AC to agency automated processing files that the files do not fall under records series listed elsewhere.		
4.7	173	Promissory Notes	AC+5		AC+5		AC=Date of cancellation or repayment		

Retention Codes (Field 7)	Archival Codes (Field 8)
AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	A – Transfer to State Archives R – Review by State Archivist
CE – Calendar Year End FE – Fiscal Year End	PM – Permanent US – Until Superseded
LA – Life of Asset MO – Months	



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Records Retention Schedule

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2. Agency Code 753		3. Agency Name SAM HOUSTON STATE UNIVERSITY							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

3.1.022	174	Promotion and Tenure Records	AC+2		AC+2	AC=Date of grant or denial of promotion or tenure 29 CFR 1602.49(a) [State Universities].		
1.1.026	175	Proof of Publication	AC+1		AC+1	AC=Date of publication		
5.2.006	176	Property Destruction, Certificates of	FE+3		FE+3			
3.1.038	177	Public Access Option Form - Form completed and signed by employee or official, or former employee or official, electing to keep home address, home telephone number, social security number, and family information open or confidential under the Public Information Act,	US		US	SEE item number 3.3.011.		

Retention Codes (Field 7)	Archival Codes (Field 8)
AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	A – Transfer to State Archives R – Review by State Archivist
CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months
	PM – Permanent US – Until Superseded



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2. Agency Code 753		3. Agency Name SAM HOUSTON STATE UNIVERSITY							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

1.1.020	178	Public Information Requests - Not Exempted - Includes all correspondence and documentation relating to requests for records that are furnished to the public under Public Information Act (Chapter 552, Government Code)	AC+1		AC+1		AC= Date request filled		
1.1.021	179	Public Information Requests - Exempted - Includes all correspondence and documentation relating to requests for records that are exempt under the Public Information Act (Chapter 552, Government Code)	AC+2		AC+2		AC=Date of notification that records are exempt.		
1.1.019	180	Public Relations Records: News, press releases, or any public relations files maintained or issued by an agency. Includes print, electronic, audio and audiovisual records	2		2	R	Archival review before disposal		
1.3.002	181	Publication Development Files	AV		AV				

Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist			



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Records Retention Schedule

SLR 105

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2. Agency Code	753	3. Agency Name	SAM HOUSTON STATE UNIVERSITY		
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4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

1.3.001	182	Publication/Institutional Reports (Record Copy)	AC+2	AC+2	AC = Until superseded or obsolete.		
4.2.005	183	Purchase Vouchers	FE+3	FE+3			
4.3.002	184	Receipts Journal or Register	FE+3	FE+3			
4.6.002	185	Reconciliations	FE+3	FE+3			
1.2.010	186	Records Disposition Log: Logs or similar records listing records destroyed or transferred to the Archives and Information Services Division, Texas State Library, showing records series title, dates of records, and date destroyed or transferred	10	10			
1.2.012	187	Records Inventory Worksheets	US	US			

<p>Retention Codes (Field 7)</p> <p>AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value</p> <p>CE – Calendar Year End FE – Fiscal Year End</p>	<p>Archival Codes (Field 8)</p> <p>LA – Life of Asset MO – Months</p> <p>PM – Permanent US – Until Superseded</p> <p>A – Transfer to State Archives R – Review by State Archivist</p>
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Records Retention Schedule

SLR 105

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2. Agency Code 753		3. Agency Name SAM HOUSTON STATE UNIVERSITY							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

1.2.005	188	Records Retention Schedule (Agency Copy)	US	US	Original is retained by the State and Local Records Management Division, Texas State Library and Archives Commission.		
1.2.006	189	Records Transmittal Forms - Agency copy (includes RMD 101, Tx-R-5, 306-58-1, and Agency Storage Forms). Forms indicate records transferred to storage or a transfer of legal custody	AC+2	AC+2	AC = Date of authorization for destruction, permanent transfer from storage, or transfer to the Archives and Information Services Division, Texas State Library and Archives Commission, by the agency records management officer.		
1.1.069	190	Reports - Activity/Employee	1	1			
1.1.067	191	Reports - Administrative	3	3	See State Archival Note		
4.5.003	192	Reports - Annual Financial	AC+6	AC+6	AC=September 1 of odd-numbered calendar years		

Retention Codes (Field 7)	Archival Codes (Field 8)
AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	A – Transfer to State Archives R – Review by State Archivist
CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months
	PM – Permanent US – Until Superseded



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2. Agency Code 753		3. Agency Name SAM HOUSTON STATE UNIVERSITY							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

1.1.066	193	Reports - Annual/Biennial Semester/Non-fiscal	AC+6		AC+6	AC=September 1 of odd numbered years. Copies to Texas State Depository Program		
1.1.002	194	Reports - Audit	AC+7		AC+7	AC=Publication or release of final audit findings. The record copy of any audit performed by the State Auditor's Office is retained permanently by the agency.		
1.1.067	195	Reports and Studies (Non-Fiscal)	3		3	See State Archival Note		
3.3.026	196	Reports - Quarterly FTE Reports to State Auditor	FE+3		FE+3			
4.5.002	197	Reports - Fiscal - Internal Management	FE+3		FE+3			
4.5.005	198	Reports - Fiscal - External - Special Purpose, includes HUB reports	FE+3		FE+3			
1.1.068	199	Reports on Performance Measures	AC+6		AC+6	AC=September 1 of odd numbered calendar years		

Retention Codes (<i>Field 7</i>)	Archival Codes (<i>Field 8</i>)
AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	A – Transfer to State Archives R – Review by State Archivist
CE – Calendar Year End FE – Fiscal Year End	PM – Permanent US – Until Superseded
LA – Life of Asset MO – Months	



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2. Agency Code	753	3. Agency Name	SAM HOUSTON STATE UNIVERSITY		
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4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

1.1.065	200	Reports and Studies (Non-Fiscal) - Raw Data	AV		AV				
1.2.008	201	Request for Authority To Dispose of State Records - Agency Copy	FE+3		FE+3		Permanently removed		
	202	Request for Financial Aid Transcript Records	AC		AC		AC=1 year after submission date.		
5.3.009	203	Request for Information	AC		AC		AC=Date of direct purpose, issuance of request for bids or decision not to proceed with the procurement, as applicable.		
5.1.007	204	Requisition for In-Agency or Inter-Agency Copy/Printing Services	AV		AV				
3.1.024	205	Resumes – Unsolicited - Retention period applies if an agency replies to the sender of a resume that it will be kept on file should future job openings occur	AV		AV		SEE item number 3.1.014 for resumes, whether solicited or unsolicited, that are used in any way in the employment selection process.		
4.7.003	206	Returned Checks (Uncollected)	AC+3		AC+3		AC=After deemed uncollectible.		

Retention Codes (<i>Field 7</i>)	Archival Codes (<i>Field 8</i>)
AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	A – Transfer to State Archives R – Review by State Archivist
CE – Calendar Year End FE – Fiscal Year End	PM – Permanent US – Until Superseded
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SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 753		3. Agency Name SAM HOUSTON STATE UNIVERSITY							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

5.4.003	207	Safety Inspections	AC+3		AC+3	AC=Inspection, or date of the correction of the deficiency if the inspection report reveals a deficiency		
4.3.001	208	Sales Journal or Register	FE+3		FE+3			
5.4.012	209	Security Access Records: 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+2	AC=Until superseded, date of expiration, or date of termination, whichever sooner.		
5.2.019	210	Service Orders	1		1			
4.7.012	211	Signature Authorization	US + FE+3		US + FE+3			

Retention Codes (<i>Field 7</i>)	Archival Codes (<i>Field 8</i>)
AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	A – Transfer to State Archives R – Review by State Archivist
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2. Agency Code 753		3. Agency Name SAM HOUSTON STATE UNIVERSITY							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

2.1.007	212	Software Programs and Documentation (see 2.2.016 for Software Registrations, Warranties and License Agreements)	AC		AC	AC = Until electronic records are transferred to and made usable in a new software environment or there are no electronic records being retained to meet an approved retention period that require the software to be retrieved and read. 13 TAC 6.94. CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.		
2.2.016	213	Software Registrations, Warranties and License Agreements	LA+3		LA+3			

Retention Codes (<i>Field 7</i>)	Archival Codes (<i>Field 8</i>)
AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	A – Transfer to State Archives R – Review by State Archivist
CE – Calendar Year End FE – Fiscal Year End	PM – Permanent US – Until Superseded
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2. Agency Code 753		3. Agency Name SAM HOUSTON STATE UNIVERSITY							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				
1.1.040	214	Speeches, Papers and Presentations	AC		AC		AC=End of term in office or termination of service in a state position Includes commencement speeches		
1.1.063	215	Staff Meeting Minutes or Notes, and supporting documentation, taken at internal agency staff meetings.	1		1				

Retention Codes (Field 7)	Archival Codes (Field 8)
AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	A – Transfer to State Archives R – Review by State Archivist
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2. Agency Code 753		3. Agency Name SAM HOUSTON STATE UNIVERSITY							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

3.2.009	216	State Deferred Compensation Records	AC+5		AC+5	AC = All accounts with a vendor or vendors for the individual participant have been closed. For instructions regarding the determination of the closure of accounts and for additional information regarding the retention period see the most current edition of the Benefits Coordinator Reference Manual issued by the Employees Retirement System of Texas.		
	217	Statistical Data/Documents	PM		PM			
1.1.055	218	Strategic Plans	AC+6		AC+6	See Note 2 AC=September 1 st of odd-numbered calendar years		
	219	Student Academic Records	PM		PM			

Retention Codes (Field 7)	Archival Codes (Field 8)
AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	A – Transfer to State Archives R – Review by State Archivist
CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months
PM – Permanent	US – Until Superseded



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2. Agency Code 753		3. Agency Name SAM HOUSTON STATE UNIVERSITY							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Agency	7. Storage	7. Total	8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
	220	Student Admission Records - Accepted	AC+5		AC+5		Buckley Amendment, confidential record. AC=graduation or date of last attendance.		
	221	Student Admission Records - Rejected	AC+1		AC+1		Buckley Amendment, confidential record		
	222	Student Block and Clear	AC+1		AC+1		AC=Until released		
	223	Student Corrective Action	AC+3		AC+3		AC=Graduation or date of last attendance.		
	224	Student Course Audit Authorizations	FE+1		FE+1				
	225	Student Course Changes (Add/Drop)	FE+1		FE+1				
	226	Student Degree Plans - Microfilm	PM		PM		Buckley Amendment confidential record - Retention period based on AACRA guidelines for academic records		
	227	Student Degree Plans - Paper	PM		PM		Buckley Amendment confidential record.		

Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist			



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2. Agency Code 753		3. Agency Name SAM HOUSTON STATE UNIVERSITY								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival 9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.		
			Agency	Storage	Total					

	228	Student Disciplinary Records	AC+7		AC+7		Buckley Amendment confidential record. AC=graduation or date of last attendance.		
	229	Student Enrollment Statistics	PM		PM		Buckley Amendment confidential record.		
	230	Student Financial Aid Applications - Accepted	AC		AC		AC=graduation or date of last attendance.		
	231	Student Financial Aid Applications - Denied	FE+1		FE+1				
	232	Student Financial Aid Award Notifications	AC		AC		AC=graduation or date of last attendance.		
	233	Student Financial Aid - Income Verification	AC		AC		AC=graduation or date of last attendance.		
	234	Student Financial Aid - Need Analysis Document	AC		AC		AC=graduation or date of last attendance.		

Retention Codes (Field 7) AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value CE – Calendar Year End FE – Fiscal Year End LA – Life of Asset MO – Months PM – Permanent US – Until Superseded	Archival Codes (Field 8) A – Transfer to State Archives R – Review by State Archivist
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Records Retention Schedule

SLR 105

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2. Agency Code 753		3. Agency Name SAM HOUSTON STATE UNIVERSITY							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

4.	5.	6.	7.			8.	9.	10.	11.
Records Series Item No.	Agency Item No.	Record Series Title	Agency	Storage	Total	Archival	Remarks	106 No.	TSLAC ONLY Amend. No.
	235	Student Grade Books (Original Grade Book)	PM		PM		Buckley Amendment confidential record. Retention period based on AACRAO Guidelines for class lists.		
	236	Student Grade Reports and Grade Changes	PM		PM		Buckley Amendment confidential record.		
	237	Student Housing Records	AC+2		AC+2		Buckley Amendment confidential record. AC=graduation or date of last attendance.		
	238	Student Identification	AC		AC		Includes request for name changes. AC=graduation or date of last attendance.		
	239	Student Loans - Journals or Registers	AC+5		AC+5				

Retention Codes (<i>Field 7</i>)	Archival Codes (<i>Field 8</i>)
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CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months
	PM – Permanent US – Until Superseded



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2. Agency Code 753		3. Agency Name SAM HOUSTON STATE UNIVERSITY							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

4.	5.	6.	7.			8.	9.	10.	11.
Records Series Item No.	Agency Item No.	Record Series Title	Agency	Storage	Total	Archival	Remarks	106 No.	TSLAC ONLY Amend. No.
	240	Student Placement and Career Counseling Records	AC+5		AC+5		Buckley Amendment confidential record. AC=graduation or date of last attendance.		
	241	Student Recruitment Records	AV/US		AV/US		Buckley Amendment confidential record.		
	242	Student Residency Information	AV		AV		Buckley Amendment confidential record.		
	243	Student Scholarship Records	AC+3		AC+3		Buckley Amendment confidential record. AC=graduation or date of last attendance.		
	244	Student Teacher Records	AC+5		AC+5		Buckley Amendment confidential record. AC=graduation or date of last attendance		
	245	Student Theses and Dissertations	PM		PM				

Retention Codes (<i>Field 7</i>)	Archival Codes (<i>Field 8</i>)
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CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months
PM – Permanent	US – Until Superseded



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Records Retention Schedule

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2. Agency Code 753		3. Agency Name SAM HOUSTON STATE UNIVERSITY							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

	246	Student Transcripts	PM		PM		Buckley Amendment confidential record. 1879-1912 on paper only		
1.1.041	247	Suggestion System Records	1		1				
5.2.020	248	Supply Usage Records	FE+1		FE+1				
3.1.035	249	Surety Bonds/Performance Bonds	AC+4		AC+4		AC=Expiration or termination of the bond according to its terms.		
5.2.021	250	Surplus Property Sale Reports	FE+3		FE+3				
1.1.038	251	Surveys/Questionnaires: Surveys returned by the customers or clients of an agency, and the statistical data maintained rating an agency's performance.	AC+3		AC+3		See item number 1.1.067 for summary reports compiled from customer surveys.		

Retention Codes (Field 7)	Archival Codes (Field 8)
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CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months
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2. Agency Code 753		3. Agency Name SAM HOUSTON STATE UNIVERSITY							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

2.1.009	252	Technical Documentation – see Texas State Records Retention Schedule (6/1/2005) for complete description.	AC		AC	<p>AC = Until electronic records are transferred to and made usable in a new hardware or software environment with new documentation or there are no electronic records being retained to meet an approved retention period that require the documentation to be retrieved and read. 13 TAC 6.94.</p> <p>CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.</p>		
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Retention Codes (<i>Field 7</i>)				Archival Codes (<i>Field 8</i>)	
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives	R – Review by State Archivist
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded		



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2. Agency Code 753		3. Agency Name SAM HOUSTON STATE UNIVERSITY							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

5.1.016	253	Telephone Message Notifications – Notifications of telephone messages. Includes emails, phone message, books and slips, etc.	1 year		1 year				
5.5.003	254	Telephone Station Activity Reports	AV		AV				
5.5.004	255	Telephone System Activity Reports	AV		AV				
	256	Tests – Student Academic	AC+1		AC+1		Buckley Amendment confidential record.		
	257	Test – Student Admission Scores And Reports – External	AC+1		AC+1		Buckley Amendment confidential record.		
4.7.011	258	Texas Building and Procurement Commission Statements (TBPC)	FE+3		FE+3				
1.1	259	Textbook Adoption Records	FE+3		FE+3				
3.4.006	260	Time Cards and Timesheets	4		4		40 TAC 815.106 (i)		
3.4.007	261	Time Off and/or Sick Leave Requests	FE+3		FE+3				
3.3.030	262	Training Administration Records	US+2		US+2				
1.1.043	263	Training Materials	US+1		US+1				

Retention Codes (Field 7)

AC – After Closed, Terminated, Completed, Expired, Settled
AV – Administrative Value

CE – Calendar Year End
FE – Fiscal Year End

LA – Life of Asset
MO – Months

PM – Permanent
US – Until Superseded

Archival Codes (Field 8)

A – Transfer to State Archives
R – Review by State Archivist



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SLR 105

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2. Agency Code	753	3. Agency Name	SAM HOUSTON STATE UNIVERSITY		
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4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

3.1.027	264	Training Records and Educational Achievement - Employee	AC+5		AC+5		AC=Termination of employment		
	265	Transcript Requests	FE+3		FE+3				
1.1.057	266	Transitory Information	AC		AC		AC=Purposes of record has been fulfilled		
4.1.007	267	Transfers or Budget Revisions	FE+3		FE+3				
3.3.023	268	Travel Authorizations Requests and Reimbursements	FE+3		FE+3				
	269	Tuition and Fee Changes	AC+5		AC+5		AC=After graduation or date of last attendance.		
3.2.007	270	Unemployment Compensation Records	AC+5		AC+5				
5.2.022	271	Utility Usage Reports	AV		AV				
5.6.003	272	Vehicle Inspection, Repair and Maintenance Records	LA+1		LA+1				
5.6.007	273	Vehicle Titles and Registration	AC		AC				

Retention Codes (Field 7)	Archival Codes (Field 8)
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2. Agency Code	753	3. Agency Name	SAM HOUSTON STATE UNIVERSITY		
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4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

5.6.005	274	Vehicle Usage Reports: includes mileage, fuel/oil consumption, passengers carried and other related operational information	FE+3		FE+3				
	275	Veterans Administration Certifications	AC+3		AC+3		AC=After graduation or date of last attendance.		
3.2.005	276	W-4 Forms: Employer's copy of "Employees' Withholding Exemption Certificate."	AC+4		AC+4		AC=Until superseded, obsolete, or upon separation of employee 26CFR 31.60001-1 (E)(2)		
3.2.006	277	Wage Rate Tables	2		2		29 CFR 516.6(a)(2)		
5.2.019	278	Work Orders (Service Orders)	1		1				
3.3.020	279	Work Schedules/Assignments	1		1				
5.4.001	280	Workers Compensation Reports	CE+5		CE+5		29 CFR 1904.6		
5.4.009	281	Workplace Chemical Lists	30		30		Texas Health and Safety Code, 502.005(d)		

Retention Codes (<i>Field 7</i>)	Archival Codes (<i>Field 8</i>)
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2. Agency Code 753		3. Agency Name SAM HOUSTON STATE UNIVERSITY							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				
4.5.001	282	Worksheets for Preparing Fiscal Records	FE+3		FE+3				
5.2.023	283	Year-To-Date Activity (Inventory Listing)	FE+3		FE+3				

Retention Codes (<i>Field 7</i>)	Archival Codes (<i>Field 8</i>)
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