



THE TEXAS A&M UNIVERSITY SYSTEM
Records Retention Schedule

Retention Codes (Field 7)

AC – See field 9 for specific records series definition
 AV – Administratively valuable
 CE – Calendar year end
 FE – Fiscal Year end
 LA – Life of Asset
 PM – Permanent
 US – Until Superseded

Archival Codes (Field 10)

A/I – Transfer to State/University Archivist
 R/O – Review by State/University Archivist
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Texas A&M System Records Retention Schedule (9th Recert., eff. 08/26/2024)

1. Agency Code: 710		2. Agency Name: Texas A&M System Office									
3. Agency Item No.	4. Record Series Item No.	5. Record Series Title	6. Description	7. Ret. Code	8. Retention Period			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
01.100.10	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.	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.	
01.100.20		Compliance Program Records	Records related to the receipt, investigation, and resolution of a complaint alleging the violation of an individual's civil rights.	AC				AC = Retain the longer of applicable federal or state laws or regulations, TAMUS requirements, or administrative value.		Note: This applies to compliance program records not covered by another records series.	
01.100.30		Civil Rights Complaint Records-Other than Title IX Complaints	Records related to the receipt, investigation, and resolution of a complaint alleging the violation of an individual's civil rights.	AC	3			AC = Final disposition of the complaint or longer as required by state or federal law.		Note: See RSIN 15.5.010 for Title IX Complaint records and AIN 03.107.10 for employee grievance records (non-civil rights). Employee or student disciplinary records arising from the complaint should be retained in accordance with the applicable retention periods (for employees, see 03.109.10 or 03.110.10; for students, see 06.218.10). This item also does not include a complaint filed with an external enforcement agency, follow RSIN 1.1.048.	
01.100.31	15.5.010	Title IX Complaints	Title IX complaints, investigations, and determination of responsibility, including informal resolution or appeal.	AC	7			AC = Final resolution of issue and appeals.			34 CFR 106.45(b)(10).



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01.100.40	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 development of the Audit Plan.	Government Code, 2102.013.
01.100.50	5.4.019	Audit Peer Review - 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).
01.101.10	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	6			AC = September 1 of odd-numbered calendar years.	I	ARCHIVES NOTE: In addition to the final version maintained in the university archives, a copy of 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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01.102.10	1.1.006	Complaint and Feedback Records	Complaints and other unsolicited feedback received by an agency from the public concerning the agency and records pertaining to the resolution of complaints.	AC	2			AC = Date of receipt, action taken, or final disposition of the complaint, whichever comes last.		CAUTION: If a complaint becomes the subject of litigation, it must be included in and is subject to the minimum retention period of RSIN 1.1.048. This item does not include civil rights complaint records or Title IX complaint records, see Agency Item Nos. 01.100.30, 01.100.31. Complaints of students or employees are not included in this item.	



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01.103.10	1.1.007	Correspondence - Administrative	Incoming/outgoing and internal leadership, supervisory, managerial, executive, administrative, substantive, and other high-level correspondence in any media, including electronic communication, 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	ARCHIVES NOTE: Only the administrative correspondence of executive staff, board or commission members, division directors and program heads require archival review. Contact the Records Officer when these records have met their retention periods. CAUTION: This records series and RSIN 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 RSIN 1.1.004; a letter concerning an audit for that prescribed by RSIN 1.1.002, etc. See also RSIN 1.1.011.	



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01.104.10	1.1.008	Correspondence - General	Non-administrative incoming/outgoing and internal correspondence, in any media, including electronic communication, pertaining to or arising from the routine operations of the policies, programs, services, or projects of an agency.		2					See comment to RSIN 1.1.007. See Also RSIN 1.1.010.	
01.105.10	1.1.010	Directives	Any document that officially initiates, rescinds, or amends general office procedures.	US	1						
01.106.10	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		



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01.107.10	1.1.013	Calendars, Appointments, and Itinerary Records	Calendars, appointment books or programs and scheduling, or itinerary records maintained by staff during business hours that document appointments, itineraries, and other activities of agency officials or employees.	CE	1				O	ARCHIVES NOTE: Only the calendars, appointment, and itinerary records of elected officials, agency heads, and board or commission members require archival review. Contact the Records Officer when these records have met their retention periods. CAUTION: A record of this type purchased with personal funds but used by a state official or employee to document his or her work activities may be a state record and subject to the retention period. See Open Records Decision 635 issued in December 1995 by the Attorney General.	



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01.108.10	1.1.014	Legal Opinions and Advice	From agency 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 OGC and University Archivist for archival preservation.	
01.109.10	1.1.019	Public Relations Records	News, press releases, marketing files and collateral, or any public relations files maintained or issued by an agency. Includes print, electronic, audio, and audiovisual records.		2				O		
01.110.10	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 (Chapter 552, Government Code). Also includes withdrawn requests.	AC	1			AC =Date request fulfilled or withdrawn.			



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01.111.10	1.1.021	Public Information Requests - Excepted	Includes all correspondence and documentation relating to requests for records that are excepted under the Public Information Act (Chapter 552, Government Code), including records provided to the legislature under section 552.008.	AC	2			AC = Date of notification that records are excepted.			
01.112.10	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 University Archivist. Organizational charts showing division/department level detail are not considered archival.	
01.113.10	1.1.024	Plans and Planning Records	Plans and records relating to the process of planning new or redefined programs, services, or projects of an agency that are neither included in nor 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.	
01.114.10	1.1.026	Texas Register Submissions	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 in the Texas Register.			
01.115.10	1.1.027	Proposed Legislation	Drafts of proposed legislation and related correspondence.	AV							



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01.116.10	1.1.038	Surveys and Questionnaires	Surveys soliciting feedback from customers, clients, or stakeholders of an agency, and the statistical data maintained rating an agency's performance.	AC				AC = Final disposition of summary report, or date of decision not to produce a report, as applicable.		See RSIN 1.1.067 for summary reports compiled from customer surveys.	
01.117.10	1.1.040	Speeches, Papers, and Presentations	Notes or text of speeches, papers, presentations, or reports delivered in conjunction with agency work.	AC	2			AC = End of event, until superseded, or obsolete.	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.	
01.118.10	11.1.006	Event Administration Records - Routine	Records created in the planning or administration of routine events, such as: reports; promotional materials; press releases and news clippings; photographs; presentation materials; schedules of speakers and activities; registration and attendance lists; participant evaluations; room reservation lists; and catering services orders.	AC	1			AC = Completion of the event.		CAUTION: Use this records series in conjunction with RRS Section 4.1 for financial records, RSIN 5.1.001a/b for written agreements or contracts, and RRS Section 5.3 for purchasing records. See RSIN 11.1.007 for records of special events.	



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01.118.20	11.1.007	Event Administration Records - University Special Events	Materials related to the planning and arrangement of informative sessions, special lecture series, lectureships, short-courses, workshops, training programs, excursions, and celebratory events for members of the institution and the communities it serves. May include but not limited to: promotional and publicity materials; press releases and news clippings; photographs; presentation materials and handouts; honoraria records; schedules of speakers and activities; registration and attendance lists; participant evaluations; and related documentation and correspondence.	AC	4			AC = Completion of the event.	O	See RSIN 11.1.006 for routine event administration records.	
01.119.10	1.1.043	Training Materials	Instructional materials and other records developed by an agency associated with training the entities or non-personnel individuals it regulates or serves, including but not limited to training manuals, course registration, class rosters, sign-in sheets, syllabuses, course outlines, and similar training aids used in external training programs.	AC	1			AC = Close of training session, after training materials superseded, or termination of training program, as applicable.		See RSIN 3.3.030 for internal personnel training materials. CAUTION: Does not include hazardous material training records. See RSIN 5.4.007.	



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01.120.10	1.1.048	Litigation Files	Records created by or on behalf of an agency in anticipation of or in the adjudication of a lawsuit.	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.	O	ARCHIVES NOTE: Cases that set legal precedent or exhibit historical value will be evaluated by the University Archivist for archival preservation.	
01.121.10	1.1.053	Registration Logs	Logs or similar records used to register persons appearing before state agencies as required by Chapter 2004, Government Code, including quarterly reports filed with the Texas Ethics Commission (TEC).	AC				AC = Report filed with the Texas Ethics Commission, or date quarterly report would have been filed when the agency has no information to report.			
01.122.10	1.1.055	Strategic Plans	Operational strategic plans, which include descriptions of information resources programs. Includes working files and related documentation used in creating the final plan.	AC	6			AC = September 1 of odd-numbered calendar years.	I	ARCHIVES NOTE: In addition to the final version maintained in the university archives, a copy of 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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01.123.10	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						28 CFR 35.105(c).
01.124.10	1.1.057	Transitory Information	Records of temporary usefulness that are not an integral part of a records series of an agency, that are not regularly filed within an agency's recordkeeping system, and that are required only for a limited period of time for the completion of an action by an official or employee of the agency or in the preparation of an on-going records series. Transitory records are not essential to the fulfillment of statutory obligations or to the documentation of agency functions. See the Explanation of Terms Section on the State RRS for examples.	AC				AC = Purpose of record has been fulfilled.		CAUTION: Records management officers should make certain records are not part of a records series that documents the fulfillment of the statutory obligations of the agency or the documentation of its functions. The disposal of transitory information need not be documented through destruction signoffs (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 (AIN 01.137.10).	



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01.125.10	1.1.058	Meetings, Agendas and Minutes of Open	Agendas and minutes of state boards, committees, commissions, and councils that conduct open meetings as required by Chapter 551, Government Code.	PM					I	ARCHIVES NOTE: Agency retains permanent record copy. The archival requirement will be met by sending a copy to the University Archivist. 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.	
01.126.10	1.1.059	Meetings, Certified Agendas or Audiovisual Recordings of Closed	Certified agendas 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, 551.103, 551.104(a).



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01.127.10	1.1.060	Meetings, Audiovisual Recordings of Open	Audiovisual recordings of open meetings of state boards, commissions, committees, and councils.	AC			90	AC = Approval of written minutes of the meeting by the governing body of an agency.		CAUTION: It is an exception to the AC+90 days retention that if an agency does not prepare written minutes, it must retain recordings of open meetings permanently, following the same retention requirements of RSIN 1.1.058. See also caution comment at RSIN 1.1.058.	
01.128.10	1.1.061	Meetings - Notes	Notes taken during open meetings of state boards, commissions, committees, and councils from which written minutes are prepared.	AC			90	AC = Approval of the written minutes by the governing body.		See caution comment at RSIN 1.1.058.	
01.129.10	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				I	See caution comment at RSIN 1.1.058.	
01.130.10	1.1.063	Staff Meeting Minutes and Notes	Minutes or notes, and supporting documentation, taken at internal agency staff meetings.		1						



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					Years	Months	Days				
01.130.20	11.1.015	University Committee Records	Records of standing, advisory, and ad hoc committees and councils made up of members from a department, a college, a variety of units, or an office where policies and procedures are set. May include but is not limited to: agendas; meeting minutes; reports; participant notes; research; raw data; working papers; and related documentation and correspondence.		3				O	CAUTION: Federal or state regulations may require longer retention periods. The university must consider any applicable federal or state regulations in establishing a retention period for each committee's records. See RSIN 1.1.063 for Staff Meeting Minutes and Notes. See Section 17.3 for review board records related to research.	
01.130.30	11.1.003	Award Administration and History Records	Records documenting the administration, rules, and history of awards, fellowships, and scholarships based on merit or achievement. May include but not limited to: 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.	O	ARCHIVES NOTE: Only institutional awards merit archival review. Department-level awards recognizing employee or student achievement do not need to be reviewed for archival value. See RSIN 1.1.019 for press releases. See RSIN 11.1.004 for award selection committee records.	



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					Years	Months	Days				
01.130.40	11.1.004	Award Selection Records	Selection committee records for institutional faculty, staff, students, and alumni considered for awards, fellowships, and scholarships based on merit or achievement. May include but not limited to: applications and supporting documents; letters of award notification, acceptance, or denial; vote tallies and ranking sheets.		2					See RSIN 3.1.037 for records of an employee receiving an award. See RSIN 11.1.003 for award administration and history records.	
01.130.50	18.3.001	Faculty and Staff Election Records	Records of elections held by various faculty and staff organizations. May include but not limited to: ballots; tabulations; and related documentation.	AC				AC = Results are verified.			
01.131.10	1.1.064	Agency Performance Measures Documentation	Any records of an agency needed for the documentation of output, outcome, efficiency, and explanatory measures in an agency's appropriations request or strategic plan, and for performance measures used to manage the agency.	FE	3					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.	



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01.132.10	1.1.065	Reports and Studies (Non-Fiscal) - Raw Data	Information or data collected and compiled for the purpose of producing non-fiscal reports.	AV						See RSIN 1.1.067 for reports produced from raw data. CAUTION: Does not include source documentation used for information or data included in or directly related to another records series in this schedule. See RSIN 1.1.064.	
01.133.10	1.1.066	Reports – Biennial or Annual Agency (Narrative)	Biennial narrative reports to the governor and legislature as required by an agency's enabling statutes, including annual narrative reports if they are required by statute. Includes working files and related documentation used in creating final report.	AC	6			AC = September 1st of odd-numbered calendar years.	I	ARCHIVES NOTE: In addition to the final version maintained in the university archives, a copy of 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.	



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					Years	Months	Days				
01.134.10	1.1.067	Reports and Studies (Non-Fiscal)	Annual, sub-annual, or special reports or studies on non-fiscal aspects of an agency's programs, services, or projects compiled by agency personnel, by advisory committees, or by consultants under contract with an agency that are not noted elsewhere in this schedule. Includes reports distributed either internally or to other entities.		3				O	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.	
01.135.10	1.1.068	Reports on Performance Measures	Quarterly and annual reports on agency performance measures submitted to executive and legislative offices.	AC	6			AC = September 1st of odd-numbered calendar years.		See RSIN 1.1.064 for documentation used to produce reports on agency performance measures.	
01.136.10	1.1.069	Reports - Activity	Reports compiled by agency personnel on a daily or other periodic basis pertaining to workload monitoring, task completion times, number of public contacts, and similar activities.		1					CAUTION: If reports are used to document performance measures, see RSIN 1.1.064.	



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01.137.10		Agency Rules, Policies, and Procedures	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	Series includes records fitting to 1.1.070 and 1.2.014. 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.	
01.139.10	1.1.072	Public Information Reports	Reports made to the Office of Attorney General (OAG) on an agency's Public Information Act activities, per Government Code, 552.010.		2						



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01.140.10	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	Note: This applies only to TAMUS agencies with regulatory functions. ARCHIVES NOTE: Only records that lead to substantial or statutory changes to the operations of the agency and its policies and procedures should be retained for archival review. Contact the State Archives when these records have met their retention periods. 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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01.141.10	1.1.074	Sunset Review Report and Related Documentation	Sunset Review Report, agency self-study, and other correspondence and supporting documentation related to the Sunset review process for state agencies.	AC	3			AC = After the subsequent Sunset Review.	O	This item only applies to Texas A&M Forest Service (records in this series subject to archival review on September 1, 2024). ARCHIVES NOTE: Related documentation includes the agency response to the commission's draft report and documentation of the agency's implementation of the commission's final recommendations. The final version of the agency self-evaluation report must be submitted to the Texas State Publications Depository Program per 13 TAC 3.3(a)(1).	
01.142.10	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.			Texas Civil Practice and Remedies Code, §154.071.



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01.142.20	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.	
01.142.30	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.	
01.142.40	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	3			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 5.4.014a/b.	



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01.142.50	1.1.079	Copyright Records	Copyright records which pertain to employees' original work. May include but not limited to a copy of the work itself as submitted to the United States Copyright Office and the corresponding copyright application, registration notice, and supplementary documents.	AC				AC = Expiration of copyright.	O		17 USC 302.
01.143.10	17.3.01 1	Patent and Invention Records - Patents, Licensing, and Disclosure Records	This series documents the transfer of technology from this institution to outside agencies as the result of research projects and grants carried out at the institution. May include but not limited to: original patents; international licensing agreements; and invention disclosure forms that list the names of the inventors and to whom the inventions have been disclosed.	AC	6			AC = Expiration of the patent.		CAUTION: If multiple patents are subject to the same license agreement, retain for the longer of the retention period, the termination or expiration of the license agreement, or the latest expiring patent.	
01.143.20	17.3.00 8	Intellectual Property Agreements	Includes license agreements, know-how agreements, and other contractual agreements resulting from the licensing of intellectual property or the transfer of intellectual property.	AC	7			AC = Completion of all terms and extensions of the agreement.	O	CAUTION: Does not include patent records. See RSIN 17.3.011.	NIH Guidelines, OMB Circular A: 110-.53, 2 CFR 200.334.



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01.143.30	17.3.009	Patent and Invention Records - Auxiliary Files	This series documents the transfer of technology from the institution to outside agencies as the result of research projects and grants carried out at the institution. May include but not limited to: patent applications; agreements giving permission for institutional researchers to use other patented inventions in their research; descriptions and titles of inventions; sources of funding to create the inventions; details of the provenance of the inventions and their documentation; suggested manufacturers; reports issued concerning the inventions; and signatures of inventors and technically qualified witnesses.		7				O		
01.143.40	17.3.010	Patent and Invention Records - Denied or Not Pursued	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 and Trademark Office (USPTO).	AC	7			AC = Date of last office action or related correspondence in file.	O	NOTE: Patent applications remain confidential unless published by the US Patent and Trademark Office or an international patent office.	
01.144.10		Organizational Memberships	Records relating to external organizational memberships of the System university or agency.	AV							



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01.145.10	13.2.005	Gift Records - Institutional	Potential or realized private, corporate, or public agency funding to the institution, including major endowments and trusts. May include but not limited to: letters and agreements of gift, copies of bequest instruments and wills from individuals or estates, and related documentation and correspondence.	PM					I	NOTE: Transfer to university archives when the records are no longer needed for the regular operations of the department of record.	
01.145.20	13.2.001	Donor Files	Includes individual donor and prospective donor files.	AC	1			AC = Prospect ceases to be viable.	I	CAUTION: Includes donor or prospective donor information only. For records of gifts, see RSINs 13.2.003 and 13.2.005.	
01.145.30	13.2.003	Gift and Fundraising Records	Records of gifts given to the agency. May include but not limited to: gift and donor lists; gift histories; gift placement arrangements; departmental endowments and trusts raised by support and "friends" groups; fundraising efforts; pledges; and background on previous donations.		7				O	See RSIN 13.2.005 for records documenting potential or realized major funding to the institution such as endowments and trusts.	
01.200.10	1.2.001	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.		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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01.201.10	1.2.003	Forms History and Maintenance	Master versions of all forms used internally and externally by the agency, including subsequent revisions to an agency form or any associated design or design modification requests.	AC	2			AC = Until superseded or use of form is discontinued.			
01.203.10	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 50 years by the State and Local Records Management Division, Texas State Library and Archives Commission.	
01.204.10	1.2.006	Records Transmittal Forms	Forms used to track the transmittal of records to/from onsite and offsite storage areas or a transfer of physical custody.	AV							
01.206.10	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.	



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01.207.10	1.2.012	Records Inventories	Worksheets or working papers used to capture records inventory information, including location tracking and to document existence and requirements of a records series.	US							
01.208.10	1.2.013	Records Access and Locator Aids	Documentation used to provide and improve access to records. Includes indexes, card files, shelf lists, registers, guides, and other finding aids.	AC				AC = When aid is superseded, or no longer needed because associated records have been destroyed.		CAUTION: These records must carry the same retention period and archival code of the records they support.	
01.210.10	1.2.015	Disaster Recovery Service Transmittals	Transmittals and related service documentation (e.g. form RMD 109) for disaster recovery services provided by TSLAC or other entities.	AV							
01.211.10	1.2.016	Disaster Recovery Service Approval Forms	Forms used by TSLAC (e.g. form RMD 113) or other entities to establish disaster recovery services, authorize agency staff to access the media, etc.	AC				AC = Until superseded or termination of service.			



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01.300.10	1.3.001	State Publications	One copy of each state publication as defined in the Explanation of Terms on the State RRS, 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	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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01.301.10	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 reuse, may be archival.	
02.101.10	2.1.002	Master Files and Application Data	Relatively long-lived computer files containing organized and consistent sets of complete and accurate electronic records and associated processing files. Examples include, but are not limited to, data tables of relational databases used by applications or computer programs.	AC				AC = Until electronic records are transferred to and made usable in a new system environment, or there are no electronic records being retained to meet an approved retention period established in this schedule that require the use of the system.		CAUTION: Records management officers must be certain before assigning the retention period of AC to agency master files and application data that the files do not fall under records series listed elsewhere.	