



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 US – Until Superseded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
 E – Exempt from archival review and transfer

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				
01.301.10	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.	



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02.102.10	2.1.007	Computer Software Programs	Agency-developed automated software applications, operating system files, and associated processing files, including job control language, programs, applications, scripts, source code, etc.	AC				AC = 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.		CAUTION: Software needed for access to electronic records must be retained for the period of time required to access the records.	13 TAC 6.94.
02.103.10	2.1.008	Computer Hardware Documentation	Records documenting operational and maintenance requirements of computer hardware such as operating manuals, hardware/operating system requirements, hardware configurations, equipment control systems, and associated processing files.	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.		CAUTION: Hardware needed for access to electronic records must be retained for the period of time required to access the records.	13 TAC 6.94.



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02.104.10	2.1.009	Hardware and Software Technical Documentation	Records adequate to specify all technical characteristics necessary for reading or processing electronic records; to document modifications to computer programs; to access, retrieve, manipulate, and interpret data in an automated system; and allow for their timely, authorized disposition. Records include, but are not limited to: user guides, system or sub-system definitions, system specifications, input and output specifications, system flow charts, program flow charts, program maintenance logs, change notices, data element dictionaries, file layouts, code books or tables, and other records that explain the meaning, purpose, structure, logical relationships, and origin of the data elements.	AC				AC = Until electronic records are transferred to and made usable in a new hardware or software environment with new documentation or there are no electronic records being retained to meet an approved retention period that require the documentation to be retrieved and read.		CAUTION: Hardware and software needed for access to electronic records must be retained for the period of time required to access the records.	13 TAC 6.94.
02.105.10	2.1.010	Audit Trail Records	Files needed for electronic data audits. Records include, but are not limited to: reports showing transactions accepted, rejected, suspended, and/or processed; history files or tapes; records of updates to application files; and security logs.	AC				AC = All audit requirements have been met.			



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02.200.10	2.2.001	System or Computer Monitoring Records	Hardware and software components for monitoring agency's computer system resources and performance.	AV						The disposal of monitoring records that are automatically overwritten need not be documented through destruction authorizations (RSIN 1.2.001) or in records disposition logs (RSIN 1.2.010), but agencies should establish procedures governing disposal of these records as part of its records management plan (RSIN 1.2.014).	
02.201.10	2.2.002	Chargeback Records to Data Processing Services Users	Records documenting usage, costs, billing, cost recovery, budgeting, and administrative functions of computer usage and data processing services for individual units / departments / divisions in an agency.	FE	3						
02.203.10	2.2.010	Data Processing Policies and Procedures	Manuals, guidelines, or similar documents establishing data processing policies and procedures in an agency in such areas as access and security, systems development, data retention and disposition, data ownership, production control, system back-up, etc.	US	3					CAUTION: Does not include technical documentation of procedures necessary for reading or processing of electronic records. See RSIN 2.1.009.	
02.204.10	2.2.011	Data Input Documents	Forms and logs used to enter and reconcile data sets submitted for processing.	AC				AC = Data entered into applicable system and, if required, verified.			



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02.206.10	2.2.013	Quality Assurance Records	Information verifying the quality of system, hardware, or software operations. Records include but are not limited to: records of errors or failures and the loss of data resulting from such failures; documentation of abnormal termination and of error-free processing; checks of changes put into production; transaction histories; and other records needed as an audit trail to evaluate data accuracy.	AC				AC = No longer needed as an audit trail for any records modified		For quality control records related to non-IT procedures, see RSIN 5.2.018.	
02.207.10	2.2.014	Internet Browser Files	A record of web pages visited during an internet session, including data files of user-specific information created by the webserver, that allows users to access previously visited pages more quickly or to generate a record of usage of a state-owned computer.	AV						The disposal of internet history records need not be documented through destruction authorizations (RSIN 1.2.001) or in records disposition logs (RSIN 1.2.010), but agencies should establish procedures governing disposal of these records as part of its records management plan (RSIN 1.2.014).	
02.209.10	2.2.016	Software Registrations, Warranties, and Licensee Agreements	Records documenting the registration and licensing of a software application to activate the software for legal use by the end users of a state agency, along with warranties providing that the software will perform in accordance with functional specifications.	LA	3						



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02.210.10	2.2.017	Help Desk Tickets	Records documenting the request for and response to help desk tickets received by divisions or units, such as information technology.	AV							
02.211.10	2.2.018	Biennial Information Security Plan	Biennial information security plan for protecting the security of the agency's information.	US							1 TAC 202.23; 1 TAC 202.73.
03.100.10	3.1.001	Applications for Employment - Not Hired	Applications, resumes, transcripts, letters of reference, and similar documents whose submission by candidates for vacant positions is required on the application form, by application procedures, or in the employment advertisement.	AC	2			AC = Date of the making of the record or the personnel action involved, whichever occurs later.		CAUTION: Does not include ADA Accommodation Requests. See RSIN 3.1.042.	29 CFR § 1602.31 [State Agencies]. 29 CFR § 1602.49(a) [State Universities].
03.101.10	3.1.002	Applications for Employment - Hired	Applications, resumes, transcripts, letters of reference, and similar documents whose submission by candidates for vacant positions is required on the application form, by application procedures, or in the employment advertisement.	AC	5			AC = Termination of Employment			
03.102.10	3.1.006	Employee Counseling Records	Notes, memoranda, or reports relating to the counseling of an employee for work-related, personal, or substance abuse problems. Usually maintained at the supervisory level except in those agencies with counseling staff.	AC	3			AC = Termination of counseling.		See AIN 03.102.20 when records are required to be kept by a licensed psychologist as required by 22 Tex. Admin. Code § 465.22(d)(2).	