



The University of Texas System

Records Retention Schedule

8th Recertified, 2nd Amended Version

Effective October 20, 2022



The University of Texas System Office of Systemwide Compliance

Welcome to the UTS Records Retention Schedule (UTSRRS)

The University of Texas System Administration Records Retention Schedule (UTSRRS) provides detailed guidance on the retention requirements for records created, received, used, and stored by or on behalf of UT System Administration.

The UTSRRS was developed and is routinely updated in response to requirements from: 1) federal and state laws for the minimum retention required for records, including state retention schedules on which the agency's schedule must be based; 2) other entities that regulate or oversee System activities; and 3) System subject matter experts for business and operational use of agency records.

The UTSRRS is certified by the Texas State Library and Archives Commission (TSLAC) and adopted as official System policy to:

- List minimum retention and archival preservation requirements for all records created in the course of System business.
- Form a basis to authorize the destruction of System records.

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CAUTION:

A record may not be destroyed if there is any action pending against it.

Even if a record meets retention requirements, it may not be destroyed if any litigation, claim, negotiation, audit, public information request, administrative review, or other action involving the record is initiated until the completion of the action and the resolution of all issues that arise from it.



The University of Texas System

Office of Systemwide Compliance

References & Resources

- State of Texas Retention Schedules** [State of Texas Records Retention Schedule \(State RRS\)](#)
[State of Texas University Records Retention Schedule \(State URRS\)](#)
- Relevant Federal and State Statutes** [Texas Government Code Chapter 441](#)
[Texas Administrative Code, Title 13, Chapter 6](#)
- System Policies & Procedures** [UTS 115 Records and Information Management](#)
[Handbook of Operating Procedures 4.1.6 Records & Information Management](#)
[Records & Information Management on SharePoint](#)
- Records Management Tools** [Records Management Forms & Templates](#)
[Request to Dispose of Records](#)
- Records Management Assistance** [Contact the UTS Records Management Officer](#)

This document is available for download from
<https://www.utsystem.edu/offices/systemwide-compliance/records-management>



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Explanation of Codes

Retention Codes:

Retention codes dictate how long a record must be retained. They are typically used in conjunction with a number of years, e.g., "AC+5."

Code	Explanation
AC	After Closed (or terminated, completed, expired, or settled): The record is related to a function or activity with a finite closure date. Refer to the "AC Definition" field for the specific closing event for this record series.
AV	As Long as Administratively Valuable: The immediate purpose for which the record was created has been fulfilled and any subsequent need for the record to conduct the operations of the agency, if any, has been satisfied.
CE	Calendar Year End: December 31 of the year in which the record was created.
FE	Fiscal Year End: August 31 of the fiscal year in which the record was created.
LA	Life of Asset: The disposal date of the asset.
PM	Permanent: Do not destroy; the record possesses enduring legal, fiscal, or administrative value and must be preserved in perpetuity by University of Texas System Administration.
US	Until Superseded: The record is replaced by an updated version.

Archival Codes:

Archival codes indicate historical research value. When an archival record has met retention, it must be either transferred to an archives for long-term preservation or reviewed by an archivist to determine whether it merits long-term preservation.

Code	Explanation
I	The record must be transferred to the UT System archives at the Briscoe Center for American History, UT Austin, when retention is met.
O	The UT System Administration archives must be contacted for an archival review of the record when retention is met. Records determined to possess enduring historical value must be transferred to the archives for long-term preservation.



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Records Common to All Departments

This section is in alphabetical order by Record Series Title.

UTS ID (AIN)	State ID (RSIN)	Record Series Title Description	Retention			AC Definition	Archival	Remarks	Legal Citations
			Code	Yrs	Mos				
ALL1851	4.1.009	Account Reconciliations Departmental copies of internal budgets, invoices, or reconciliations, including any related tracking systems.	FE	3					
ALL1801	1.1.013	Calendars, Appointments, and Itineraries Calendars, appointment books, or other itinerary records that document business activities.	CE	1				CAUTION: Not for records of the Chancellor or Board of Regents; see CHA2143 and BOR2143. NOTE: The disposition of Outlook calendars is tied to employee separation.	
ALL2142	1.1.007	Correspondence – Executive Incoming/outgoing and internal leadership, supervisory, managerial, executive, administrative, substantive, and other high-level correspondence in any media, including email or other 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.	AC	4		AC=End of term or service in agency.	○		

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Archival Codes:

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			Code	Yrs	Mos				
ALL1798	1.1.008	Correspondence - Non-Executive Emails, letters, memos, or other communications concerning System operations that are not included in another record series on this schedule.	AC	2		AC=Date sent or received.			
ALL2200	5.2.029	Correspondence - Returned Mail Documentation of mail returned by the postal or other mail delivery services as undeliverable.	AC	1		AC=Date returned.			
ALL2201	2.1.002	Databases - 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	0		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.			
ALL2202	5.1.004	Directories - Mail and Telecommunications Listings Any lists or directories of mailing addresses, telephone or fax numbers, or email addresses maintained by an agency on its employees or on entities or persons it serves.	AC	0		AC=Date superseded or discontinued.			

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ALL2203	3.1.000	Employee Supervision Files Time off requests and authorizations, overtime or compensatory time authorizations, and any notes maintained by a supervisor on an employee's work or performance.	FE	3				Convenience copies of personnel information held by Human Resources should be destroyed when no longer needed for reference.	Texas Government Code, Section 661.152(d); 29 CFR 825.500(b); 29 CFR 1620.32(c)
ALL1942	5.2.010	Equipment Manuals	LA	0					
ALL2214	11.1.006	Event Planning Records Records relating to the planning and administration of a conference, forum, or other event. Records may include reservation information, catering services orders, participant evaluations, summary reports, and related correspondence.	AC	3		AC=Completion of the event.			
ALL1849	4.5.002	Fiscal Management Reports and Worksheets Internal and external periodic fiscal management reports and associated worksheets, including federal financial reports, salary reports, HUB reports, investment performance reports, etc.	FE	5					
ALL2215	1.1.000	Meeting Agendas and Minutes – Governance/Advisory Committees Agendas, minutes, and supporting documentation of meetings of	AC	5		AC=Approval of minutes or, if no minutes are prepared, date of the meeting.		CAUTION: Does not include records of Board of Regents committees; see BOR1247 and BOR2117.	

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			Code	Yrs	Mos				
		governance or advisory boards, councils, and committees.							
ALL1827	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.	AC	0		AC=Date superseded or discontinued.	I	ARCHIVES NOTE: Only charts showing the overall arrangement and administrative structure of the agency require archival transfer. Organizational charts showing only department level detail are not considered archival and may be destroyed when they meet retention.	
ALL1828	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	CAUTION: Some of these records may be confidential.	
ALL1800	3.3.025	Policies, Procedures, and Directives (Internal) Any internally distributed manuals, guidelines, or similar records that define internal policies, job procedures, or general office procedures.	AC	3		AC=Date superseded or discontinued.			
ALL1829	1.1.070	Policies, Procedures, and Rules - System Programs and Services Manuals, guidelines, administrative rules, or similar records distributed internally for the use of employees or	AC	3		AC=End of need for rule, policy, or procedure.	O	Chiefly for external policies. For internal policies, see ALL1800. ARCHIVES NOTE: Working files and related documentation used	

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		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.						in creating the final rules, policies, and procedures, are not subject to archival review and may be destroyed at the expiration of the retention period.	
ALL2205	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.	AC	2		AC=Date created.	○		
ALL2206	1.3.001	Publications – Major (Archival) A publication is defined as information in any format that is publicly distributed by the agency, statutorily required to be distributed by the agency, or produced by the authority of or at the expense of the agency. The term generally does not include information distributed solely to internal staff, staff of other government agencies, or contractors/grantees of the agency. "Major" is defined by both the publication's authorship and its impact on Texas and Texans. Some examples of major publications include	AC	2		AC=Publication is superseded or discontinued.	I	ARCHIVES NOTE: Copies of major publications must be submitted to the Texas State Publications Depository Program, TSLAC, by law. Design files, images, original artwork, or drafts created in the creation of a major publication are also considered archival.	Texas Government Code, Sec. 441.101-.106 and 13 TAC 3.1-.16

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		handbooks, guides, manuals, external newsletters, research reports or studies, and statistical compilations.							
ALL2207	1.3.001	Publications – Minor (Non-Archival) Information in any format that is publicly distributed by the agency, statutorily required to be distributed by the agency, or produced by the authority of or at the expense of the agency. The term generally does not include information distributed solely to internal staff, staff of other government agencies, or contractors/grantees of the agency. Some examples of minor publications include brochures, announcements, artwork, and internal newsletters.	AC	2		AC=Publication is superseded or discontinued.		NOTE: Development files of minor publications (drafts, design files, images, etc.) are transitory information and may be destroyed when no longer needed for reference.	
ALL2208	1.2.013	Records Access and Tracking Systems Documentation used to provide and improve access to records. Includes indexes, card files, shelf lists, registers, guides, and other finding aids.	AC	0		AC=When tracking system is superseded, or no longer needed because associated records have been destroyed.		CAUTION: These records must carry the same retention period and archival codes of the records they support.	
ALL1940	1.2.014	Records Management Plans Departmental records management plans (DRMPs), file plans, and similar records that establish the procedures under which records are managed in a department.	AC	1		AC=Date superseded or discontinued.			

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ALL2209	3.3.023	Reimbursable Activity Records Requests and authorizations for travel; participation in educational programs, workshops, or college classes; or for other work-related activities for which the expenses of the employee are defrayed or reimbursed.	FE	3					
ALL1943	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.	FE	1					
ALL1840	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.	AC	10		AC=Date of report.	○		
ALL2210	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	0					

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ALL2212	4.7.012	Signature Authorizations Records establishing authority of an agency employee to authorize financial, legal, or operational transactions on behalf of an agency. Includes Delegated Signature Authority (DSA) memos or other records serving this purpose, including emails.	AC	4		AC=Until superseded, date of expiration, or termination of employment, whichever sooner.			
ALL1831	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.	○	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.	
ALL1837	1.1.063	Staff Meeting Minutes and Notes Minutes or notes, and supporting documentation, taken at internal agency staff meetings.	FE	1				NOTE: Intended for meeting summaries, substantive notes or reports and supporting documentation from internal meetings. Individual reminder or reference notes made by individuals are generally considered Transitory Information; see item number ALL1835.	
ALL1843	3.3.030	Training Development and Presentation Records –Internal Records documenting the planning, development, implementation,	AC	2		AC=Close of training session, after training materials superseded, or termination of		CAUTION: Does not include police academy training records; see applicable POL series. Does	

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		administration, and evaluation of in-house training programs, including but not limited to training manuals, course registration, class rosters, sign-in sheets, syllabi, course outlines, and similar training aids used in in-house training programs.				training program, as applicable.		not include hazardous materials training records; see RC1642.	
ALL2213	1.1.043	Training Materials and Administrative Records – External 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.		CAUTION: Does not include police academy training; see applicable POL series. See ALL1843 for internal personnel training materials and EHS1642 for hazardous material training records.	
ALL1835	1.1.057	Transitory Information Records of temporary usefulness that are not an integral part of a records series of an agency and are not essential to the fulfillment of statutory obligations or to the documentation of agency functions. Some examples of transitory information, which can be in any medium (voice mail, fax, email, hard copy, etc.) are routine messages; telephone message notifications;	AC	0		AC=Purpose of record has been fulfilled.			

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		internal meeting notices; routing slips; incoming letters or memoranda of transmittal that add nothing of substance to enclosures; and similar routine information used for communication, but not for the documentation, of a specific agency transaction.							
Academic Affairs									
ACA12	1.1.000	Chronological Administrative Records	AC	20		AC=End of term.			
ACA1178	17.1.011	Degree Programs – Working Files Letters or forms required by the Texas Higher Education Coordinating Board.	AC	5		AC=After approval by department head.		NOTE: OAA retains for reference only; master records held by UT institutions.	
ACA1756	1.1.000	Appointments by Governor	FE	1			○		
ACA1956	3.1.014	Presidential Search Committee Records May include notes of interviews with candidates; questions asked of applicants; audio and videotapes of job interviews; driving record and previous injury checks; and all other records that document the selection process, except for those noted in Remarks.	AC	2		AC=Date of the making of the record or the personnel action involved, whichever occurs later.		CAUTION: Does not include criminal history checks; see POL1766.	29 CFR 1602.49(a)
ACA2006	3.3.020	Work Schedules or Assignments	FE	1					

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Audit									
AUD1957	5.4.018	Annual Audit Plan Includes working papers and agency risk assessment used to develop the plan.	AC	7		AC=After final plan has been issued.			Texas Government Code, Sec. 2102.013
AUD1958	3.1.019	Performance Appraisals Job evaluations, performance appraisals, or other similar documents used to evaluate the performance of an employee.	FE	2					29 CFR 1620.32(c)
AUD1960	1.1.002	Audits Audits and reviews performed by or on behalf of the agency, including the working papers that support the audit.	AC	7		AC=Publication or release of final audit findings.			
AUD1962	5.4.019	Quality Assessment Reviews – Other Programs Working papers and final reports of Quality Assessment reviews of outside entities, performed by System Audit Office staff.	AC	5		AC=After final report has been issued.		NOTE: Applies only to reviews led by a System Audit employee. If the System Audit employee is only participating in the review, workpapers may be considered transitory information.	
AUD1964	5.4.019	Quality Assessment Reports – System Audit Office Reviews of the System Audit Office, performed by external/independent firms.	AC	10		AC=Until superseded, but see note.		NOTE: Retain the previous three reports until a new report is issued.	Texas Government Code, Sec. 2102.007(a)(5)

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Board of Regents									
BOR1247	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.	PM				I		
BOR1866	1.1.070	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. Includes working files and related documentation used in creating rules, policies, and procedures.	PM				I		
BOR1963	1.1.066	Reports - Biennial or Annual Agency (Narrative)	AC	6		AC=September 1 of odd-numbered calendar years.	I	ARCHIVES NOTE: The archival requirement is met by sending the final version of these reports	

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		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, but see Archives Note.						to the Texas State Publications Depository Program, Texas State Library and Archives Commission, per 13 TAC 3.3. Working files and related documentation used in creating the final report may be disposed of at the expiration of the retention period.	
BOR1965	3.1.013	Employment Contracts Contracts or agreements regarding the terms and conditions of the employment of Chief Administrative Officers.	AC	7		AC=Termination of employment of Chief Administrative Officer.		"Chief Administrative Officer" is defined in Regents' Rule 10501, Section 3.4.	Texas Government Code, Sec. 441.1855
BOR1966	3.1.027	Training and Educational Achievement Records (Individual) Certificates of completion, certifications, licenses, transcripts, test scores, or similar records documenting the training, testing, certification, licensing, or continuing education achievements of an employee.	AC	5		AC=Termination of employment.			
BOR1967	3.1.034	Resumes-Unsolicited Retention period only applies if the agency replies to the sender of a resume that it will be kept on file should future job openings occur.	AV	0				See HR1000 for resumes, whether solicited or unsolicited, that are used in any way in the employment selection process.	
BOR1974	5.1.005	Postage Records Records and reports of postage expenses, including postal meter usage.	FE	3					

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BOR1975	3.1.014	Chancellor and Presidential Search Committee Records Includes notes of interviews with candidates; questions asked of applicants; audio and videotapes of job interviews; driving record and previous injury checks; pre-employment physical examinations; polygraph examination results; and all other records that document the selection process, except for those noted in Remarks	AC	2		AC=Date of the making of the record or the personnel action involved, whichever occurs later.		CAUTION: Does not include criminal history checks; see POL1766.	29 CFR 1602.49(a)
BOR1976	1.1.059	Meetings, Certified Agendas or Audiovisual Recordings of Closed Agendas, minutes, or audiovisual recordings of closed meetings of state boards, commissions, committees, and councils.	AC	2		AC=The date of the meeting or completion of pending action involving the meeting, whichever is later.			Texas Government Code, Sec. 551.104(a)
BOR1978	1.1.007	Correspondence - Executive (Regental) Correspondence, sent or received by the Board of Regents or any of its members, that pertains to the formulation, planning, implementation, interpretation, modification, or redefinition of the programs, services, or projects of the University of Texas System or its institutions.	PM				I		

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BOR1979	1.1.060	Meetings, Audiovisual Recordings of Open Audiovisual recordings of open meetings of state boards, commissions, committees, and councils.	AC	0	3	AC=Official approval of written minutes of the meeting by the Board of Regents.		CAUTION: These recordings must be retained at least 90 days.	
BOR2117	1.1.058	Meeting Agenda and Minutes Agendas and minutes of meetings of the Board of Regents.	PM				I	ARCHIVES NOTE: Agency retains permanent record copy. The archival requirement will be met by sending a copy to the Briscoe Center for American History at UT Austin.	
BOR2143	1.1.013	Calendars, Appointments, and Itineraries – Regental Calendars, appointment books, or other scheduling or itinerary records maintained by or on behalf of the Board of Regents or any of its members.	AC	1		AC=End of term of service.	O		
Budget & Planning									
BUD1000	4.9.001	Annual Operating Budgets Required by the General Appropriations Act.	PM					Budget Office is the source of historical information for system and institutional inquiries.	
BUD1001	1.1.004	Legislative Appropriation Requests Includes Legislative Appropriation Request (LAR) and any supporting documentation created and/or used to justify and support the request.	PM				I	Budget Office is the source of information for system and institutional inquiries. ARCHIVES NOTE: The final version of Legislative Appropriation Requests must be submitted to	

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								the Texas State Publications Depository Program per 13 TAC 3.3(a)(3)(A).	
BUD1002	4.5.002	Fiscal Notes Fiscal notes and working papers.	AC	6		AC=September 1 of odd-numbered calendar years.			
BUD1003	4.9.001	Budgeting Documentation Includes documentation about budget transfers and revisions, as well as detail charts of accounts. Also includes work papers used to prepare budgets.	FE	10				CAUTION: Does not include Annual Operating Budgets; see BUD1000. Does not include copies of budgeting information maintained by departments; see ALL1851.	
BUD1004	1.1.068	Reports on Performance Measures and Supporting Documentation Quarterly and annual reports on agency performance measures submitted to executive and legislative offices. Includes supporting documentation.	AC	6		AC=September 1 of odd-numbered calendar years.			
Capital Projects									
Building Construction									
OFPC1000	1.1.067	Capital Improvement Project (CIP) Reports Annual and quarterly reports of all major new construction and repair and	PM					NOTE: Major projects are defined in the Regents' Rules and Regulations as those with a total project cost of \$10,000,000 or	

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		rehabilitation projects to be implemented and funded from institution and System-wide revenue sources.						more. Projects that are architecturally or historically significant are also identified as major projects regardless of cost.	
OFPC1322	5.2.002	Building Construction Project Files Project records related to planning, design, construction, conversion, or modernization of state facilities, structures, infrastructure, and systems, including feasibility, screening, and implementation studies; topographical and soil surveys and reports; as-builts; laboratory test reports; environmental impact statements; correspondence; successful and unsuccessful bid documentation and other related documentation.	AC	11		AC=Completion of project.	○		
OFPC1323	4.7.000	Fiscal Records for Construction Projects	AC	11		AC=Close of project. The project close date is based on the fiscal year of the final payment to the contractor.			
OFPC1325	5.2.003	Building Plans and Specifications Includes architectural and engineering drawings, profiles, and blueprints of planning, design, construction, conversion, or modernization of state	LA	0			○		

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		owed facilities, structures, infrastructure, and systems.							
OFPC1948	5.2.028	Building Contracts Building construction contracts, surety bonds, and inspection records.	LA	10			○		
Facilities Management									
FAC1721	5.2.019	Service Orders Requests or work orders for repairs or maintenance to facilities, vehicles, or equipment completed by internal agency personnel or external service providers.	AC	5		AC=Service request completed.			
FAC1722	5.4.012	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=Until superseded, returned, date of expiration, or date of termination, whichever sooner.			
FAC1800	5.1.005	Postage Records Records and reports of postage expenses, including postal meter usage.	FE	3					
Chancellor									
CHA1269	3.1.000	Financial Disclosure and Conflict of Interest Affidavits For the Chancellor and Presidents.	FE	3					

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CHA2143	1.1.013	Calendars, Appointments, and Itineraries – Chancellor Calendars, appointment books, or other scheduling or itinerary records maintained by or on behalf of the Chancellor.	AC	1		AC=End of term of service.	○		
CHA2144	3.1.019	Executive Officer Performance - Workplans and Appraisals Job evaluations, performance appraisals, or other similar documents used to evaluate the performance of an employee.	FE	3					29 CFR 1620.32(c)
Controller									
Accounts Payable/General Accounting									
CON1000	4.1.001	Accounts Payable Information Invoices; vouchers (encumbrance, purchase, expenditure, or special vouchers); statements; copies of checks and purchase orders; expenditure authorizations; ledgers; and similar records that serve to document disbursements. Includes ProCard statements and backup documentation.	FE	3					
CON1001	4.1.009	Accounts Receivable Information Bill copies or stubs, statements, billing registers, account cards, deposit warrants, cash receipts, credit card	FE	3					

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		receipts, receipts books, cash transfers, daily cash reports, reconciliations, special vouchers, and similar records that serve to document money owed to or received by a state agency and its collection or receipt.							
CON1002	4.8.001	Banking Records Bank statements, credit card statements, cancelled checks, check registers, deposit slips, debit and credit notices, reconciliations, and other banking related records.	FE	3					
CON1003	4.5.010	Unclaimed Property Reports and Documentation Sufficient records to verify information on unclaimed property showing the name and last known address of the apparent owner of reportable unclaimed property, a brief description of the property, and the balance of each unclaimed account, if appropriate. Includes both escheatment and documentation of unclaimed property claims made by System.	AC	10		AC=Date on which property is reportable or date the report is filed, whichever is later.			Texas Property Code, Sec. 74.103(b)
CON1004	4.7.003	Uncollectible Accounts Records of accounts deemed uncollectible, including write-off authorizations and returned checks, warrants, and drafts.	AC	3		AC=Date account deemed uncollectible.			

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CON1005	5.3.010	Payee Information Forms Includes requests for Taxpayer Identification number (TIN) and Certification (W-9 Forms).	FE	3				FE=The fiscal year in which the account is opened or the instrument is purchased.	26 CFR 31.3406(h)-3(g)
CON1289	4.1.006	Investment Transaction Files Records documenting the investment of any public funds that evidence the investment of such funds, the cancellation or withdrawal of investments, and similar activities.	FE	5					
CON9999	4.7.008	IPSI Grant Records Grant authorization records, which provide evidence of the award of grants to or by agencies; grant/project financial or performance reports, which are periodic reports of financial activity and/or program performance related to grants received or made by agencies.	AC	3		AC=Satisfaction of all Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments (the Common Rule).		Record series to be deleted after disposition of files in FileNet coded IPSI1930.	
Contracts/Procurement									
CNP1001	5.3.007	Bid Documentation – Successful and Unsuccessful Includes all bid requisitions/authorizations, Requests for Proposals (RFP), Requests for Qualifications (RFQ), invitations to bid or propose, bid specifications, all bids regardless of	AC	7		AC=Date of expiration or termination of the instrument according to its terms or decision not to proceed with the bid.		NOTE: The Executive Vice Chancellor for Business Affairs (EVCBA) is the owner of contracting record per Regents' Rule 10501, but delegates the maintenance of centralized contracting files to the Office of	Texas Government Code, Sec. 441.1855

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		whether awarded, and bid tabulation/evaluations (scoresheets).						the Controller (Contracts and Procurement). To ensure compliance with RR 10501, departments must provide all non-transitory contracting records to Contracts and Procurement for inclusion in the central contract administration system.	
CNP1002	5.3.007c	Bid Documentation – Invalid or Withdrawn Bids that do not meet agency submission requirements and are not included in the bid evaluation process (e.g. withdrawn, missed submission deadline, incomplete submission, etc.)	AC	2		AC=Date of notification of denial or date of withdrawal, as applicable.			
CNP1003	5.1.001	Contract Administration Files Contracts, leases, and agreements include general obligation, land lease, utilities, construction except for buildings (see OFPC1948), and certain employment contracts (see also BOR1965). Documents include specifications, affidavits of publication of calls for bids, performance bonds, contracts, purchase orders, inspection reports, and correspondence. May also include other applicable documentation in the master contract	AC	7		AC=Expiration or termination of the instrument according to its terms.		NOTE: To ensure compliance with RR 10501, departments must provide all non-transitory contracting records to Contracts and Procurement for inclusion in the central contract administration system. See Remarks of CNP1001.	Texas Government Code, Sec. 441.1855

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		file per Texas Comptroller of Public Accounts Contract Management Guide.							
CNP1004	5.3.009	Requests for Information Requests for information preliminary to the procurement of goods or services by direct purchase or bid.	AC	0		AC=Date of direct purchase, or decision not to proceed with the procurement, as applicable.		CAUTION: If the request for information leads to request for proposal or bid, see item CNP1001.	
CNP2000	5.1.017	Contract Summaries and Reports Contract Summaries, Purchase Order Summaries, Past Request for Proposal Postings, and the Contract Transparency Report.	FE	3					
Inventory/Asset Management									
CON2000	5.2.006	Inventory and Property Control Records Records documenting the inventorying, maintenance, usage, and disposal of supplies, equipment, and property of a state agency. Includes property logs and cards for lost and found property. May also include lost, stolen, or damaged property reports.	FE	3				NOTE: The Controller maintains the official record of inventory, but department inventory contacts are responsible for maintaining copies of inventory information provided by individual staff (e.g., emails or pictures) for their respective departments.	
CON2001	4.7.004	Capital Asset Records Documentation relating to the capital and fixed assets of a state agency, including equipment or property history cards containing data on initial cost, depreciation schedules or	LA	3					

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		summaries used for capital outlay budgeting, and property sale, auction, or disposal records of agency owned equipment and property.							
Payroll									
CON3000	3.2.002	Payroll Records Payroll records and registers documenting employee earnings, wages, and pay. This may include but is not limited to W-4 Forms, W-5 Forms, Income Adjustment Authorizations, Direct Deposit Applications and Authorizations, Employee Deduction Authorizations, payroll input records, summary statements, payroll vouchers, payroll detail sheets, and payroll history.	FE	4				NOTE: Some older payroll records may be retained by Human Resources in the employee file. Such payroll records are retained until superseded or separation or termination of employment + 5 years.	40 TAC 815.106(i)
Reports/Reporting (Fiscal)									
CON1274	4.5.002	Worksheets for Preparing Fiscal Reports	FE	9					
CON1278	4.5.003	Annual Financial Reports Annual Financial Report (AFR) required by the General Appropriations Act (100 Day Report).	PM				I	ARCHIVES NOTE: The final report must be submitted to the Texas State Publications Depository Program per 13 TAC 3.3(a)(2)(a).	

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CON1279	4.5.003	Annual Financial Report— Working Files Working files and related documentation used to prepare the AFR.	FE	7					
Taxes									
CON4000	3.2.003	Federal Tax Records Includes 1099, W2, FICA, excise tax, and other tax records.	AC	4		AC=Tax due date, date claim is filed, or date tax is paid, whichever is later.			26 CFR 31.6001- 1(e)(2)
CON1273	3.2.003	Unrelated Business Income Tax (UBIT) Records Form 990-T and related tax records. Also includes OK512E and related documentation.	AC	23		AC=Tax due date, date claim is filed, or date tax is paid, whichever is later.		See IRS Publication 598.	
Travel/Aircraft Operations									
TRA1738	5.6.002	Airplane Passenger Lists List of passengers on an aircraft.	FE	3					
TRA1739	5.6.001	Airplane Flight Logs Logs and related documentation used to maintain information about state owned aircraft flight data.	LA	3				Records are maintained by the office of the State Aircraft Pooling Board.	

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Employee Benefits									
OEB1304	2.2.011	Employee Benefits Data Entry Logs	AC	0		AC=When reconciliation confirmed.			
OEB1307	1.1.000	Contracted Carrier Correspondence and Reports	FE	7					
OEB1309	4.5.002	Financial Statements	FE	5					
OEB1314	3.1.011	Employee Insurance Records (Including Affordable Care Act and COBRA Records) Includes all employee insurance records.	AC	6		AC=Termination of coverage.			
OEB1316	3.3.000	Insurance Contracts Medical, Vision, Dental, Long-Term Care, Long and Short-Term Disability, Flexible Spending Account, Wellness	AC	15		AC=End of contract.			
OEB1492	3.3.004	Retirement Plan Documents	US	10				Audit requirements require 10-year retention period.	29 CFR 1627.3(b)(2)
OEB2077	3.3.004	Employee Benefits Plan Information	US	1					29 CFR 1627.3(b)(2)
OEB2078	4.1.001	Benefits Billing Payment Logs	FE	3					
OEB2079	4.1.009	Accounts Receivable Ledgers Ledgers related to employee benefits.	FE	3					
OEB2080	4.5.002	Worksheets for Preparing Fiscal Reports	FE	5					

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		Worksheets related to employee benefit operations.							
OEB2081	3.2.008	Direct Deposit Applications or Authorizations Direct payment agreements for COBRA and retirees.	US						
OEB2148	1.1.065	Employee Benefits Members Issues	AC	2		AC=Resolution of issue.			
OEB2149	1.3.000	Employee Insurance and Retirement Employee Reference Materials	AC	0		AC=Until superseded or obsolete.			
OEB2152	3.1.000	Employee Benefits Mandated Benefits Coordination and Secondary Payee Claims	AC	3		AC=Resolution of claim.			
OEB2153	3.1.000	Retirement Loan and Deferred Compensation Plan Information	AC	10		AC=After loan has been paid.			
OEB2154	3.1.000	Employee Benefits Medicare Records	AC	6		AC=Resolution of claim.			
OEB2155	4.8.001	Employee Benefits ProCard and Expenditure Vouchers	FE	7					
OEB2156	4.7.005	Employee Benefits Special Claims May include incapacitated dependent applications, dependent amnesty, special dependent applications, and ZIP Code applications.	AC	5		AC=Resolution of claim.			
*OEB2157	4.7.005	Employee Benefits Insurance - Electronic Medical Claims	AC	7		AC=Resolution of claim.		*Record series amended 10/5/22	

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OEB2158	5.1.001	Life Insurance Contracts and Retirement Contracts	AC	30		AC=Expiration or termination of the instrument according to its terms.		For Employee Benefits Insurance Contracts, see item CNP1003 (Contract Administration Files).	
OEB2160	1.1.002	Audits	AC	7		AC=Publication or release of final audit findings.			
OEB2161	2.2.010	Employee Benefits Security Policies, Procedures and Program Documentation	US	6					
OEB3000	3.1.011	UTGRA Records Personnel records of participants of the University of Texas Government Retirement Agreement (UTGRA) program.	AC	10		AC=End of payout.		In accordance with Article 1, Paragraph 1.9 (b) of the UTGRA Plan Document, OEB maintains UTGRA records on behalf of the Board of Regents (BOR). The BOR therefore is the owner of the records but delegates OEB to take any ministerial actions necessary on behalf of UT System for the administration of the UTGRA plan.	29 CFR 1627.3(b)(2)

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External Relations, Communications, and Advancement									
Gifts									
GPS1574	13.2.005	Gift Records – Active Includes active files for Endowments, Estates, Charitable Trusts, Held-in Trust by Others, Contingent or Revocable Gifts, and Current Purpose Gifts.	PM				I	Archival code added per 13 TAC Sec. 6.10(b), but records will remain at UT System in perpetuity.	
GPS1575	13.2.003	Estates or Assets Held in Trust by Others	AC	10		AC=Close of estate or trust.	I		
GPS1576	13.2.003	Endowments - Term	AC	7		AC=Endowment funds have been completely transferred.	I		
GPS1577	13.2.005	Endowments – Perpetual	PM				I	Archival code added per 13 TAC Sec. 6.10(b), but records will remain at UT System in perpetuity.	
GPS1578	13.2.003	Charitable Trusts/Pooled Income Fund/Remainder Interests in Life Estates	AC	7		AC=Close of estate or trust.	I		
GPS1583	13.2.000	Proposed, Contingent and Revocable Files	AC	3		AC=After determination of gift status.			
GPS1753	4.1.000	Federal Tax Records IRS Forms 5227, 1041, 1065, and similar tax records related to the Charitable	AC	4		AC=Tax due date, date claim is filed, or			

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		Remainder Trust. Comprises copies of records received from The University of Texas/Texas A&M Investment Management Company (UTIMCO).				date tax is paid whichever is later.			
GPS1772	13.2.001	Donor Records Includes individual donor and prospective donor files.	AC	7		AC=Prospect ceases to be viable.	I	NOTE: The name or other identifying information about a donor may be withheld from public disclosure under the Public Information Act (Government Code Sec. 552.1235).	
GPS1777	13.2.005	Namings Records related to philanthropic namings. May include, but is not limited to, gift agreements, confidential donor correspondence, and UT System approval letters.	PM				I	Archival code added per 13 TAC Sec. 6.10(b), but records will remain at UT System in perpetuity.	
GPS2004	4.8.001	Banking Records Bank statements, deposit slips, gift envelopes, and related records.	FE	3					
GPS2106	13.2.003	Current Purpose Gifts	AC	7		AC=Close of estate or trust.	I		
Special Events									
SPE1555	11.1.007	Official Occasion Records Records pertaining to the administration of special events. May include records on planning and arrangements, reports, promotional	AC	4		AC=Completion of the event.	O		

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		and publicity materials, photographs, schedules of speakers and activities, registration and attendance lists, participant evaluations, and related documentation and correspondence.							
Finance									
FIN1002	4.8.001	Banking Records Bank statements listing account balances.	FE	3					
FIN2025	4.7.010	Long-Term Liability Records Records documenting financial obligations of a state agency that are not payable within one year of the date of the balance sheet, including debentures, loans, deferred tax liabilities, bonds, and pension obligations.	AC	3		AC=Retirement of debt; Bonds have been paid in full and presented to UT System Administration.		UTS 181, Sec. 9: Records Retention	
General Counsel									
OGC1864	1.1.000	Legal Files – Long-Term Value Closed legal files with ongoing administrative, legal, or historical value, as determined by the attorney responsible for the file. May include litigation files or non-litigation files such as environmental permits,	AV				○	CAUTION: This record series is only to be used for closed files that have met retention under another record series. For example, a Health Law case classified under this record series must first be retained for AC+20 in accordance with OGC1862.	

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		superfund actions, environmental studies, or FCC licenses.						ARCHIVES NOTE: Historically significant litigation case files or legal opinions must be transferred to the UT System archives at the UT Briscoe Center for American History when retention is met.	
OGC1000	1.1.000	Legal Files – Business Law Legal files pertaining to contracts and transactional work.	AC	7		AC=Expiration of contract.		Files with long-term value beyond the retention period specified in this record series should be reclassified under OGC1864 when retention is met.	
OGC1862	1.1.048	Litigation Files – Health Law Records created by or on behalf of the agency or its institutions in anticipation of or in the adjudication of a lawsuit.	AC	20		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).		NOTE: Retention period reflects extended administrative value of Health Law cases, which may pertain to medical malpractice insurance matters. Files with long-term value beyond the retention period specified in this record series should be reclassified under OGC1864 when retention is met.	

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OGC1472	1.1.048	Litigation Files – General Records created by or on behalf of the agency or its institutions in anticipation of or in the adjudication of a lawsuit.	AC	3		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).		Files with long-term value beyond the retention period specified in this record series should be reclassified under OGC1864 when retention is met.	
OGC1473	17.3.011	Patents Issued/Released	AC	6		AC=Life of patent (17-20 years, depending on when patent is issued).			35 USC Sec. 154
OGC2115	4.7.005	Claims & Bankruptcy Files (Nonlitigation)	AC	5		AC=Resolution of claim.		Inactive record series. To be removed from schedule after all existing boxes have been dispositioned.	
OGC2118	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 the Public Information Act (Chapter 552, Texas Government Code). Also includes withdrawn requests.	AC	2		AC=After request has been satisfied or withdrawn.			

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OGC2119	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, Texas Government Code), including records provided to the legislature under section 552.008.	AC	2		AC=Date of notification that records are excepted.			
OGC2120	1.1.072	Public Information Reports Reports made to the Office of Attorney General (OAG) on an agency's Public Information Act activities.	AC	2		AC=Date of submission to OAG.			Texas Government Code, Sec. 552.010
OGC2141	1.1.000	Professional Liability Enrollment, Changes, and Resignation	AC	20		AC=Date of enrollment.			
Governmental Relations									
OGR1332	1.1.027	Proposed Legislation Drafts of proposed legislation and related correspondence.	AC	1		AC=End of current legislative session (typically May 31).			
Health Affairs									
HEA1344	1.1.000	Meeting Agenda and Minutes - Council of Health Institutions	AC	10		AC=When agenda and minutes and finalized.		NOTE: Council disbanded 7/22/15; was not a governmental body as defined by Texas Government Code, Chapter 551.	

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HEA2116	3.1.014	Presidential Search Committee Records - Health Institutions Applications, job descriptions, communications, CVs, contacts, search committee contacts, search guidelines, search committee rankings, and interview notes.	AC	2		AC=When applicant accepts or declines the position.		CAUTION: Does not include criminal history checks; see POL1766.	29 CFR 1602.49(a)
HEA2161	3.1.000	Personnel Files - Health Institution Presidents Employment communications, assessments, compensation, and corrective or disciplinary actions.	AC	5		AC=Termination of employment.			
HUB Programs									
HUB1261	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	15		AC=September 1 of odd-numbered calendar years.	I	ARCHIVES NOTE: The archival requirement is met by sending the required copies of the reports to the Texas State Publications Depository Program, Texas State Library and Archives commission.	
Information Security									
ISO1000	2.2.001	System Monitoring Records	AV	0				The disposal of monitoring records that are automatically	

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		Records used to control and monitor a system, its data, and its security. May include vulnerability scans, intrusion tests, malicious code detection tests, threat and risk assessments, technical security reviews, patch management logs, intrusion detection logs, firewall logs, and related records. May also include records reporting on the levels and patterns of usage of system hardware, software application, or internet resources.						overwritten needs not be documented.	
ISO1001	2.2.018	Biennial Information Security Plan Biennial information security plan for protecting the security of the agency's information.	US	2					1 TAC 202.23; 1 TAC 202.73
Police									
Police Academy Records									
POL1542	1.1.000	Post Academy Training Files	US	5				Texas Commission on Law Enforcement requires that ODOP maintain these records.	37 TAC Chapter 215
POL1765	1.1.000	User Identification Information Sheets	US	0					
POL1949	1.1.000	Training Materials - Academy Training	AC	5		AC=After graduation of cadet class.		Texas Commission on Law Enforcement recommends keeping indefinitely.	37 TAC Chapter 215

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POL1950	1.1.000	Training Materials - Police Basic Training	AC	50		AC=End of training.		Retained as a record of instructor and subject matter for each academy class.	
Officer Personnel Records									
POL1761	3.3.027	Aptitude and Skills Tests Aptitude, competency, or skills tests and checklists required of job applicants or of current personnel to qualify for promotion or transfer, including validation records.	US	3					29 CFR 1602.49
POL1528	3.3.028	Aptitude and Skills Tests (Test Papers) Completed aptitude, competency, or skills test papers and checklists of job applicants or of current personnel taking a test to qualify for promotion or transfer.	CE	3					29 CFR 1602.49
POL1766	3.1.026	Criminal History Checks Criminal history record information on job applicants or agency employees obtained from the Department of Public Safety (DPS).	AC	0		AC=The criminal history record has served the immediate purpose for which it was obtained.			Texas Government Code, Chapter 411, Subchapter F
POL1537	3.1.000	Personnel Files - Commissioned Officers	AC	5		AC=Separation or termination of employment.			

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POL1771	3.1.000	Personnel Files - Office of Director of Police	AC	5		AC=Separation or termination of employment.		Forward to Personnel Office for Officers, Admin, and Guards at termination.	
Public Safety Records									
POL1531	5.4.011	Visitor Control Registers Logs, registers, or similar records documenting visitors to limited access or restricted areas of agency facilities.	FE	3					
POL1538	5.4.012	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=Until superseded, date of expiration, or date of termination, whichever sooner.		Electronic records are the official copy. Paper records provide vital records protection.	
POL1543	16.3.000	Police Investigations/Reports	AC	0		AC=Statute of limitations.		Maintained for legal reasons or until investigation matters are resolved.	
POL1768	16.3.039	Parking Citations Includes related correspondence.	AC	3		AC=End of fiscal year of resolution.			
POL1770	5.2.006	Property Logs and Cards for Lost and Found Property	FE	3					
POL2000	5.1.018	Surveillance Video Surveillance videos of buildings, facilities, vehicles, or other state property.	AV	0				See RWC1707 if video is needed for an accident investigation; see OGC1472 if the video is needed as evidence in litigation. The	

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								disposal of surveillance videos needs not be documented.	
Administrative and Reporting Records									
POL1529	5.6.005	Vehicle Use Reports Includes mileage, fuel/oil consumption, passengers carried and other related operational information.	FE	3					
POL1951	1.1.063	Meeting Notes - Component Institution Police Chiefs	FE	10					
POL1952	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.	PM				○		
POL2003	1.1.067	Reports - Annual Inspections of Component Institutions	CE	10			○		
Real Estate									
REA1212	1.1.000	Real Estate Closing Papers	PM						

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REA2113	1.1.000	Component Properties and Trust Fund Properties - Working Papers	AC	7		AC=Termination or expiration of lease or contract.			Texas Government Code, Sec. 441.1855
Risk Management									
General									
ORM1000	1.1.067	Risk Management Annual Report	AC	10		AC=Date of report.	○		
ORM1001	3.2.007	Unemployment Compensation Records Records and documentation relating to unemployment compensation claims, including reimbursement of funds disbursed by Texas Workforce Commission (TWC).	AC	5		AC=After closed, terminated, completed, expired, or settled.			
ORM1002	4.1.000	Accounting Records Includes monthly premium transfers, vouchers, billing detail, and similar accounting records.	FE	3					
ORM1003	4.5.002	Annual Financial Statements	FE	30				Annual statements must be kept to compile statistical information.	
Risk Control									
RC1000	3.1.000	Driver Training Records and Checks Motor Vehicle Record (MVR) checks and driver training administration records.	AC	5		AC=Date of inactivity in RMIS system.		UTS 157, Sec. 4: Requirements for Authorized Drivers	

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RC1001	5.4.000	Emergency Management Peer Reviews Assessments of emergency preparedness and planning efforts at UT institutions created to document compliance with Texas Education Code, Section 51.217, Multihazard Emergency Operations Plan: Safety and Security Audit. Also includes checklists and other working files.	AC	7		AC=Report submitted.			Texas Education Code, Sec. 51.217
RC1002	5.4.013	Emergency Response Plans Plans developed to mitigate the damage of potential events that could endanger an agency's ability to function. Includes disaster preparedness, response, and recovery plans.	US	0					Texas Labor Code, Sec. 412.054
RC1641	5.4.002	Evacuation Plans Plans for evacuation of agency facilities in cases of emergency.	US	0					
RC1642	5.4.007	Hazardous Material Training Records Records of training given to employees in an agency hazard communications program. May include but is not limited to date of class, roster of attendees, subjects covered, and instructors.	AC	5		AC=Date of training.			Texas Health and Safety Code, Sec. 502.009(g)
RC1639	5.4.003	Inspection Records Fire, safety, and other inspection records of agency facilities and	AC	3		AC=Date of inspection, or date of the correction of the		CAUTION: Does not include inspection reports of building construction; see OFPC1948.	

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		equipment, including orders issued by inspectors to correct deficiencies in compliance with any code or regulations.				deficiency if the inspection report reveals a deficiency.			
RC1732	1.1.069	Project Safety Reports Monthly reports from all active construction sites on any incidents that happen on site. Also includes STEP Awards, confirmation emails, certificates, and memos, given to site managers and teams for maintaining low incident numbers.	FE	7					
RC1003	1.1.000	Resource Allocation Program (RAP) Records Budget reports, summaries, memoranda, and emails supporting the administration of the RAP Program.	FE	10					
RC1640	5.4.000	System Hazard Reports	AC	3		AC=Release of report.			
RC1699	4.7.005	Systemwide Insurance Claim Files Records documenting requests for payment of a sum of money according to the terms of a policy or contract.	AC	4		AC=Resolution of claim.			
Risk Finance									
RF1697	5.1.013	Systemwide Insurance Policies Property and Casualty policies including supporting documentation relevant to the implementation,	AC	20		AC=Expiration or termination of the policy according to its terms and/or claims		Needed to confirm past policies' coverage as insurance companies are not required to maintain this information.	Texas Government Code, Sec. 441.1855

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		modification, renewal, or replacement of policies.				resolution associated with said policy.			
RF1698	5.1.013	Systemwide Insurance Policies – WC Workers' Compensation policies including supporting documentation relevant to the implementation, modification, renewal, or replacement of policies.	AC	50		AC=Expiration or termination of the policy according to its terms and/or claims resolution associated with said policy.		Needed to confirm past policies' coverage as insurance companies are not required to maintain this information.	Texas Government Code, Sec. 441.1855
Workers' Compensation Insurance									
RWC1707	5.4.001	Accident Reports and Associated Documentation Accident or occupational disease reports (by supervisors and employees) and other associated reports required to be submitted to the State Office of Risk Management (SORM) or its predecessors or maintained internally on accident frequency.	CE	10				Used in preparing analyses of program experience.	29 CFR 1904.33; 28 TAC 120.1(c)
RWC1708	4.7.005	Claim Files – Workers' Compensation Claim files used to administer benefits.	AC	50		AC=Resolution of claim.			
Systemwide Compliance									
Compliance (General)									
SWC1649	5.4.000	Risk Assessment and Monitoring Plans	US	5					

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SWC2000	1.1.006	Complaint Investigation Records Complaints received by the agency and records pertaining to the resolution of the complaints.	AC	2		AC=Date of receipt, action taken, or final resolution of the complaint, whichever comes latest.		CAUTION: If a complaint becomes the subject of litigation, it must be included in and is subject to the minimum retention period of OGC1472.	
SWC2001	3.1.041	Outside Activity Portal Records Requests and authorizations for secondary employment or outside activities, including volunteer service.	AC	2		AC=Date superseded, obsolete, or date of separation, as applicable.			
Records & Information Management									
RIM1944	1.2.010	Records Disposition Requests and Logs Records disposition request forms submitted by departments and master records disposition log of records destroyed or transferred to archives.	FE	10				FE=The end of fiscal year in which the records were disposed. Records Management Officer maintains master records of final disposition.	13 TAC 6.8(b)(3)
RIM2044	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.	AC	0		AC=Date superseded or discontinued.		Inventories may be held either at the departmental level (by Records Management Coordinators) or agency level (by the Records Management Officer).	
RIM2121	1.2.005	Records Retention Schedule (SLR 105) and Development Files Includes records retention schedules and working files. Working files document the development, revision,	AC	0		AC=As long as administratively valuable after superseded.		Original retention schedules are retained by the State and Local Records Management Division, Texas State Library and Archives Commission.	

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		approval, and certification of the schedule.							
RIM2123	1.2.000	Records Management Program Compliance Records Files demonstrating departmental and program compliance with state rules and agency policies for records and information management.	FE	10					
Talent and Innovation									
Human Resources									
HR1000	3.1.000	Recruitment File Files maintained on each job posting. Each file typically includes the job posting and approval sheet. As applicable, may also include applications of those who were not selected, notes on the interview process, and related information.	FE	2					
HR1001	3.1.000	Individual Personnel Files Master personnel record of an individual employee. May include employment applications and all related documents, ADA documents, benefit and enrollment forms, biographical information, complaints/grievances, criminal	AC	5		AC=Until superseded or separation or termination of employment.		Convenience copies of personnel information held by a department should be retained in accordance with ALL2203.	29 CFR 1620.32(c)

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		background check authorizations, Employment Eligibility Verification (Form I-9), performance management documents, employee data change forms, separation documents, and signed acknowledgement forms.							
HR1003	3.3.001a	Affirmative Action Plans	FE	5					29 CFR 30.8(e) for apprenticeship records
*HR1004	3.4.006	Time and Attendance Records Records documenting individual employee's hours worked, including work schedules and documentation evidencing adherence to or deviation from normal hours for those employees working on fixed schedules. May also include FMLA, LWOP, and other leave records maintained by HR.	FE	4				*Record series amended 10/5/22 For leave requests/authorizations maintained only by supervisors, see ALL2203.	Texas Government Code, Section 661.152(d); 40 TAC 815.106(i); 29 CFR 825.500(b)
HR1005	3.3.011	Former Employee Verification Records Minimum information needed to verify employment. Must include the employee's name, social security number, exact dates of employment, and last known address.	AC	75		AC=Separation or termination of employment.			
HR1006	3.4.008	Sick Leave Pool Documentation	FE	3					

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		Records documenting number of hours transferred in and out of comprehensive sick leave pool.							
HR1007	3.1.038	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 Texas Public Information Act.	AC	75		AC=Until superseded or separation or termination of employment.			Texas Government Code, Sec. 552.024
HR1008	3.2.008	Direct Deposit Applications/ Authorizations	AC	5		AC=Separation or termination of employee or after amendment, expiration, or termination of authorization, whichever sooner.		Ownership of payroll records was transferred to the Office of the Controller; see CON3000.	
HR1009	3.1.011	Employee Insurance Records – Active and Separated Employees Includes Beneficiary Designation Group Insurance form, Certification of Group Health Plan Coverage, dependent information, insurance activity, Insurance Enrollment Change form (SSN documents and Medicare; Tobacco Declaration), ERS/TRS documents, and Optional Retirement	AC	75		AC=Until superseded or separation or termination of employment.			

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		Plan (ORP) documents such as Vesting/Termination Status forms.							
HR1010	3.1.011	Employee Insurance Records - Retired and Deceased Employees Includes Beneficiary Designation Group Insurance form, Certification of Group Health Plan Coverage, dependent information, insurance activity, Insurance Enrollment Change form (SSN documents and Medicare; Tobacco Declaration), ERS/TRS documents, and Optional Retirement Plan (ORP) documents such as Vesting/Termination Status forms.	AC	75		AC=Until retirement or death of employee.			
HR1011	3.3.000	Personnel Administration and Compensation Reports Any reports compiled in the administration of the System workforce. Includes, but is not limited to, EEO reports/supporting documentation and job classification review files.	FE	3				NOTE: Office of Risk Management is the record owner of Texas Workforce Commission (TWC) reports.	
Innovation									
INN1000	4.1.006	Investment Records Signed Horizon Fund agreements and related documentation.	AC	20		AC=Expiration or termination of agreement.			

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Technology & Information Services									
OTIS1000	2.2.017	Help Desk Tickets Records documenting requests for technical assistance and related correspondence.	AV	0					
OTIS1507	1.1.000	Information Technology Project and Systems Documentation Project management records, design documentation, feasibility studies, justifications, user requirements, etc.	AV	0					
OTIS1509	5.5.002	Telephone Activity Reports Telephone logs created for internal documentation purposes; station activity reports of internal listings of incoming/outgoing telephone activity to individual telephone stations; operator call transfers; summary detail reports; and system activity reports of internal listings of all incoming/outgoing agency telephone activity.	AV	0					
OTIS1518	2.1.008	Hardware Documentation Records documenting operational and maintenance requirements of computer hardware such as operating manuals, hardware/operating system requirements, hardware configurations,	AC	0		AC=Until electronic records are transferred to and made usable in a new hardware environment or there are no electronic		CAUTION: Software needed for access to electronic must be retained for the period of time required to access the records.	13 TAC 6.94

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		equipment control systems, and associated processing files.				records being retained to meet an approved retention that requires hardware to be retrieved and read.			
OTIS1525	5.4.012	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. Includes network request forms.	AC	2		AC=Until superseded, date of expiration, or date of termination, whichever sooner.			
OTIS1526	2.2.001	System Monitoring Records Records used to control and monitor a system, its data, and its security. May include vulnerability scans, intrusion tests, malicious code detection tests, threat and risk assessments, technical security reviews, patch management logs, intrusion detection logs, firewall logs, and related records. May also include records reporting on the levels and patterns of usage of system hardware, software application, or internet resources.	AV	0				The disposal of monitoring records that are automatically overwritten needs not be documented.	

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OTIS2128	2.1.007	Software Programs Internally developed automated software applications, operating system files, and associated processing files, including job control language, programs, applications, scripts, source code, etc.	AC	0		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
OTIS2141	5.2.008	Equipment History Equipment history file, which may include logbooks and requests for installation, moves, service, repair, etc.	LA	7					
Texas Medical & Dental Schools Application Service (TMDSAS)/Joint Admission Medical Program (JAMP)									
MED1000	17.1.000	JAMP Council Agreements with Participating Schools Agreements with participating medical schools, general academic teaching institutions, or private/independent institution of higher education as required by Sections 51.829-.831, Texas Education Code.	AC	7		AC=Expiration or termination of the agreement.		Agreements must be renewed every four years.	Texas Education Code, Secs. 51.829-.831

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			Code	Yrs	Mos				
MED1001	1.1.058	JAMP Council Meetings – Agenda, Minutes, and Supporting Documentation	PM				I	ARCHIVES NOTE: JAMP retains permanent record. The archival requirement will be met by sending a copy to the UT System archives, UT Austin.	
MED1002	1.1.026	JAMP Council Meetings – Open Meeting Notices	AC	1		AC=Date of publication in the Texas Register.			
MED1003	1.1.060	JAMP Council Meetings – Recordings Audiovisual recordings of open meetings.	AC	0	3	AC=Approval of written minutes of the meeting by the JAMP Council.		CAUTION: If no minutes are prepared, the recordings must be retained permanently in accordance with MED1001.	
MED1004	1.1.066	JAMP Council Reports Biennial narrative reports to the governor and legislature as required by Texas Education Code, Sec. 51.834. Includes working files and related documentation used in creating final report.	AC	6		AC=September 1 of odd-numbered calendar years.		ARCHIVES NOTE: Four copies of the published report must be sent to the Texas State Publications Depository Program, Texas State Library and Archives Commission, per 13 TAC 3.3. Working files and related documentation used in creating the final report may be destroyed of at the expiration of the retention period.	Texas Education Code, Sec. 51.834
MED1005	1.3.001	Media Podcasts, videos, and similar audiovisual recordings produced for public distribution.	AC	2		AC=Until discontinued and no longer administratively valuable.	O	CAUTION: Media files must be saved in a location that is under UT System control, per 13 TAC 6.94.	

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			Code	Yrs	Mos				
MED1006	1.3.002	Media Production Files Images, sound clips, or other design elements used in the production of media recordings.	AV	0			○		
MED1460	15.1.000	JAMP Student Applications and Student Agreements Applications to the JAMP program including all supporting documentation, agreements with the JAMP Council required by Section 51.828, Education Code, and any other records pertaining to an individual applicant.	AC	10		AC=End of application cycle.			Texas Education Code, Sec. 51.828
MED1463	15.1.000	TMDAS Student Applications Applications submitted to the Texas Medical & Dental Schools Application Service and all supporting documentation.	AC	10		AC=End of application cycle.			
University Lands									
Accounting									
ULA1001	5.1.010	Commingling Permits	AC	4		AC=Expiration date of permit.			
ULA1002	1.1.000	Document Control	US	0					
ULA1003	4.1.000	Gas Charge and Penalty Charge Vouchers Includes working papers.	FE	10					

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			Code	Yrs	Mos				
ULA1004	4.1.000	Gas Purchase Statements	FE	3					
ULA1005	4.1.000	Gas Royalty Ledgers and Penalty Ledgers	FE	10					
ULA1006	4.1.000	Income and Income Penalty Vouchers Includes working papers.	FE	10					
ULA1007	4.1.000	Oil Charge and Oil Penalty Charge Vouchers	FE	10					
ULA1008	4.1.000	Oil Royalty Ledgers and Oil Penalty Ledgers	FE	10					
ULA1009	4.5.000	Price Bulletins	FE	10					
ULA1010	4.1.000	Remittance by Document (UT-3)	FE	10					
ULA1011	4.5.000	Summaries-Penalty and Interest on Late Payments	FE	10					
ULA1012	5.1.001	Take In Kind (TIK) Oil and Gas Contracts	AC	7		AC= Expiration or termination of the instrument according to its terms.			Texas Government Code, Sec. 441.1855
ULA1013	1.1.000	Unplugged Well Report	US	0					
ULA1014	1.1.069	Weekly Letter Report provided to university departments detailing oil and gas resources and compliance.	PM						
ULA1015	1.1.000	Well Record History Master history record; includes information found in ULA1016 and ULA1017.	PM						
ULA1016	1.1.000	Well Records (Plat Books)	AV	0			I	Historical value only; no longer used.	

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			Code	Yrs	Mos				
ULA1017	1.1.000	Well Tickets Historical information used for exploration and development of oil and gas resources.	AV	0					
Budget & Revenue									
ULB1001	4.1.009	Accounts Receivable Ledgers Related to West Texas oil and gas operations.	FE	3					
ULB1002	4.8.001	Bank Statements	FE	3					
ULB1003	4.9.001	Budgets and Budgeting Records Includes encumbrances and documentation about budget transfers and revisions, as well as detail charts of accounts.	FE	3					
ULB1004	4.1.000	Damage Account Detail by Lease	AC	10		AC=Date created.			
ULB1005	4.5.000	FAWP (Funds for Agriculture and Wildlife Projects) Applications	FE	3					
ULB1006	4.5.000	FAWP (Funds for Agriculture and Wildlife Projects) Applications—Summary	AC	20		AC=Date created.			
ULB1007	4.5.000	Grazing Lease – Animal Unit Reports	AC	30		AC=Date created.			
ULB1008	4.1.009	Grazing Lessees’ Livestock Change Forms Forms received from lessees that document changes in the number of livestock on university lands. Used to calculate billing.	FE	3					

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ULB1009	4.1.000	Grazing Lessees' Payment Calculations	AC	10		AC=Date created.			
ULB1010	5.1.012	Livestock Market Prices Information used to calculate the per-animal-unit amount.	AC	10		AC=Date created.			
ULB1011	4.1.000	Purchasing Journal Vouchers	FE	10					
ULB1012	4.1.000	Refund Vouchers – ULAO Copy	FE	10					
ULB1013	4.1.000	Surface Ledgers (Brine, Saltwater, Disposal, Grazing, Surface, and Water)	FE	10					
ULB1014	4.5.002	Variance Report	FE	10					
ULB1015	5.6.005	Vehicle Use Reports Includes mileage, fuel/oil consumption, passengers carried and other related operational information.	FE	3					
Engineering									
ULE1001	1.1.000	Technical Well Files	PM						
Geology									
ULG1001	1.1.000	Electric Logs	PM						
ULG1002	1.1.000	Geophysical Contour Maps Source for evaluating acreage for oil and gas leases.	AV	0					
Information Technology									
ULT1001	5.1.000	Lease Maps Used for exploration and compliance.	US	0				Maps are paper and Mylar film.	Texas Education

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			Code	Yrs	Mos				
									Code, Sec. 66.77
ULT1002	5.1.000	Maps of University Lands Project files used to create hard copy maps.	LA	0				Necessary for historical value.	Texas Education Code, Sec. 66.77
ULT1003	2.1.007	Software Programs	AC	0		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
Land									
ULL1001	5.1.001	Gas and Oil Contracts Contracts governing operator's sale of oil or gas.	PM						Texas Government Code, Sec. 441.1855
ULL1002	5.1.001	Lease Agreements, Unit Agreements, and Assignments	PM						Texas Government Code, Sec. 441.1855

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ULL1003	5.1.001	Lease Assignment Briefs	PM						
ULL1004	5.1.000	Lease Sale Information	AV	0					
ULL1005	5.1.000	Lease Sale Nominations Information Confidential information used to compile listing of tracts to be offered for oil and gas leasing.	AC	5		AC=Date created.			
ULL1006	5.1.000	Lease Sale Results Historical reference data of oil and gas leasing.	PM						
ULL1007	1.1.000	Pugh Clause Data – Development Compliance Information used for exploration and development of oil and gas resources.	AV	0					
Right of Way									
ULR1001	5.1.000	Abandoned Line Records	AC	0		AC=Line has been removed.		Environmental Compliance.	
ULR1002	5.1.000	Brine Lease Data	PM						
ULR1003	4.7.000	Easements on U. T. Lands	PM						
ULR1004	5.2.000	Rate and Damage Schedules Information used to help determine new fee structures on U.T. Lands. Based on information in expired leases.	AC	50		AC=Date created.			
ULR1005	5.1.001	Saltwater Disposal Agreements	AC	7		AC=Expiration or termination of the instrument according to its terms.			Texas Government Code, Sec. 441.1855
ULR1006	1.1.000	Water and Hard Minerals Prospect Permits and Supporting Data	PM						

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ULR1007	5.2.000	Water Books/Management Records	PM					Maintained permanently for environmental and historical purposes.	
Surface									
ULS1001	1.1.000	Geophysical Survey Permits and Supporting Documents Information used for exploration and development of oil and gas leases.	AV	0					
ULS1002	5.1.000	Grazing Easements on U. T. Lands	PM					Maintained for historical purposes.	
ULS1003	5.1.001	Surface Leases	PM						Texas Government Code, Sec. 441.1855
ULS1004	1.1.000	Wildlife Harvest Recommendations Used for yearly trend analysis.	AC	30		AC=Date created.		Midland record is sole record.	

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The University of Texas System

Office of Systemwide Compliance

Departmental Acronyms Used in this Schedule

Acronym	Department Name	Acronym	Department Name
ACA	Office of Academic Affairs	OGR	Office of Governmental Relations
ALL	All Departments	OIRA	Office of Institutional Research and Analysis
AUD	System Audit Office	ORM	Office of Risk Management
BOR	Board of Regents	OTI	Office of Talent and Innovation
BUD	Office of Budget and Planning	OTIS	Office of Technology and Information Services
CHA	Office of the Chancellor	POL	Office of Director of Police (also "ODOP")
CNP	Contracts and Procurement	RC	ORM/Risk Control
CON	Office of the Controller	REA	Real Estate Office
EXT	External Relations, Communications, & Advancement	RF	ORM/Risk Finance
FAC	Facilities Management	RIM	Records and Information Management
FIN	Office of Finance	RWC	ORM/Workers' Compensation Insurance
FSS	Controller/Financial Shared Services	SIS	Shared Information Services
GPS	Gift Admin., Compliance, & Advancement Services	SWC	Systemwide Compliance Office
HEA	Health Affairs	SPE	External Relations/Events Office
HR	Human Resources (also "OTI")	TRA	CON/Travel Services and Aircraft Operations
HUB	Historically Underutilized Business Development	ULA	University Lands/Accounting (also "ULAO")
INN	Innovation and Strategic Investment	ULB	University Lands/Budget and Revenue
ISO	Information Security Office	ULE	University Lands/Engineering
JAMP	Joint Admission Medical Program	ULG	University Lands/Geology
MED	Texas Medical and Dental Schools Application Service	ULL	University Lands/Land
OCP	Office of Capital Projects (also "OFPC")	ULR	University Lands/Right of Way
OEB	Office of Employee Benefits	ULS	University Lands/Surface
OFPC	Office of Capital Projects (also "OCP")	ULT	University Lands/Information Technology
OGC	Office of General Counsel		