



The University of Texas System

Records Retention Schedule

8th Recertified, 6th Amended Version

Effective April 27, 2026



STATE OF TEXAS
Records Retention Schedule Certification

SLR 105C

Form SLR 105 or SLR 122 must accompany all submissions of this form.

Section 1. Agency Information

(Submitting agencies complete this section only)

Agency Code 720
Agency Name The University of Texas System

(Check one)

- Initial Certification - Form SLR 105
Recertification - Form SLR 105
Amendment - Form SLR 122

I hereby certify that this records retention schedule was prepared in accordance with Texas Government Code, Chapter 441, Subchapter L.

(Check one)

- Agency Head
Records Management Officer

Signature Angela Ossar
Name (Print or type) Angela Ossar
Date March 31, 2026

Section 2. Approvals

(Submitting agencies do not write in this section)

State Auditor's Office
(For the exclusive use of the State Auditor's Office)

Signature Not Required at This Time
Name (Print or type)
Date

Texas State Library and Archives Commission
(For the exclusive use of the State Library and Archives Commission)

Signature Gloria Mendez
Name (Print or type) Gloria Mendez
Date 4-8-2026

Cert/Recert No. 8 Amendment No. 6



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US	Until Superseded: The record is replaced by an updated version.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.

CAUTION

A state record with an expired retention period may not be destroyed if any litigation, claim, negotiation, audit, public information request, administrative review, or other action involving the record is initiated; its destruction shall not occur until the completion of the action and the resolution of all issues that arise from it.

A state record with a retention period that expires during any litigation, claim, negotiation, audit, public information request, administrative review, or other action involving the record may not be destroyed until the completion of the action and the resolution of all issues that arise from it.

Amendment Note: If this schedule is amended at any point after certification, updated records series will be indicated by an asterisk (*) preceding the Agency Item Number (AIN).

State and Local Records Management Division
Texas State Library and Archives Commission
(Rev. 7/20)





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Rev. 2021-07

Retention Codes (field 7)

AC – See field 9 for specific records series definition
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Archival Codes (Field 10)

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R/O – Review by State/University Archivist
E – Exempt from archival review and transfer

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					Years	Months	Days				
ALL1851	4.1.009	Account Reconciliations	Departmental copies of internal budgets, invoices, or reconciliations, including any related tracking systems.	FE	3						
*ALL2223	1.1.002	Audits - External Audit Support	Documentation prepared or maintained by a department in response to an external audit providing evidence to support the findings, conclusions, recommendations, and response, including a copy of the final audit report.	AC	7	0	0	AC=Publication or release of final audit findings.		Applies only to external audits. Departmental copies of internal audit reports may be destroyed when no longer useful for reference.	
*ALL1801	1.1.013	Calendars	Calendars, appointment books, or other itinerary records that document business activities.		2					CAUTION: Not for calendars of the Chancellor or Board of Regents; see CHA2143 and BOR2143.	
*ALL2217	5.1.001a	Contract Management	Contract sponsor or departmental contract administrator (DCA) documentation of managing a contract from execution through closeout. Includes, but is not limited to, reports and deliverables required by the contract, documentation of monitoring activities, and general correspondence related to the contract. May also include reference copies of contracts, checklists, amendments, purchase orders, change orders, and contractor invoices.	AC	7			AC=Expiration or termination of the contract according to its terms.		CAUTION: Does not include building construction contracts; see item OCP1322. Does not include life insurance or retirement contracts; see OEB2158. See item CNP1003 for contracting records maintained by Contracts and Procurement.	



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*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 of service in agency.	O	CAUTION: This record series should be used only for correspondence that is not included in or directly related to another record series on this retention schedule. ARCHIVES NOTE: Only the executive correspondence of executive staff, board members, division directors and program heads require archival review.	
*ALL1798	1.1.008	Correspondence - General	Emails, letters, memos, or other communications concerning System operations that are not included in another record series on this schedule.		2						
*ALL2200	5.2.029	Returned Mail	Documentation of mail returned by the postal or other mail delivery services as undeliverable.	AC	1			AC=Date returned.			



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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.			
*ALL2216	3.1.000	Departmental Personnel Files	Information about an employee that is maintained at the department level, usually by a supervisor or HR Liaison. May include but is not limited to checklists, notes, or working documents related to any personnel matter.	AC		6		AC=Date of separation or transfer to another department.		CAUTION: Checklists should be retained by the department until six months after separation from the department. All other records in the file must be transferred to the Office of Talent and Innovation immediately upon separation from the department.	
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.			
ALL1942	5.2.010	Equipment Manuals		LA	0						



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*ALL2214	11.1.006	Event Planning Records	Records relating to the planning and administration of a conference, forum, or other event. May include, but is not limited to: reports, planning meeting minutes, promotional materials, photographs, presentation materials, schedules of speakers and activities, registration and attendance lists, participant evaluations, room reservation lists, or catering services orders.		10					Does not include contracts; see ALL2217.	
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	11.1.015	Meetings - Governance/Advisory Committees	Records of governance or advisory boards, councils, and committees. May include but is not limited to agendas, minutes, and related documentation and correspondence.	AC	10	0	0	AC=Final meeting of board, council, or committee.	O	CAUTION: Does not include records of Board of Regents committees; see BOR1247 and BOR2117. For routine internal staff meetings, see ALL2221.	
*ALL2224	1.1.063	Meetings - Internal Staff Committees	Records of internal staff committees. May include but is not limited to agendas, minutes/notes, and related documentation.	AC	1	0	0	AC=Final meeting of committee.		CAUTION: Does not include records of governance or advisory committees (see ALL2215) or search committees.	



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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 that are neither included in nor directly related to other records series in this schedule.		10				O	CAUTION: Some of these records may be confidential. For event planning, see ALL2214. For routine departmental planning, see ALL2221.	
*ALL1800	5.1.014	Policies and Procedures - Business Operations	Policies, procedures, or guidelines providing governance and direction for routine business operations that are not listed elsewhere on this schedule.	AC	1			AC=Date superseded or discontinued.			
*ALL1829	1.1.070	Policies and Procedures - UTS/HOP	Policies and procedures governing the U. T. System (UTS/Systemwide Policies) and U. T. System Administration (HOP/Handbook of Operating Procedures). Includes final published policies as well as working files that demonstrate the formulation, planning, modification, or implementation of the policies.	AC	3			AC=Until superseded, or termination of program, policy, or procedure, whichever applicable.	O	See BOR1866 for Regents' Rules and Regulations. ARCHIVES NOTE: Only published policies are subject to archival review. Working files used in creating policies may be destroyed when retention is met.	



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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.	O		
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 handbooks, guides, manuals, external newsletters, research reports or studies, and statistical compilations.	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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					Years	Months	Days				
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.			
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						



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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.	O		
*ALL2221	1.1	Routine Administration	Records related to routine administrative or housekeeping activities of the agency, including records documenting departmental, committee, or team administration, planning and management. Includes general correspondence, staff meeting minutes and notes, and routine operational reports.	AC	2			AC=Date last modified.		Individual reminder or reference notes made by individuals are generally considered Transitory Information; see item number ALL1835. Only correspondence that is not included in or directly related to another record series on this schedule should be categorized under this record series. Includes RSIN 1.1.008, 1.1.063, 1.1.069.	
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.			



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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.	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.	
*ALL2225	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	0	0	0	AC=Retain as long as report of survey findings is retained. If no report is created, retain no longer than 2 years.		See also: ALL1840 (reports and studies), ALL2221 (routine administration), ALL2214 (event planning).	
*ALL1843		Training Materials	Final copy of conducted training materials. Includes, but is not limited to syllabi, presentations, instructor guides, handbooks, lesson plans, online modules, and other course material. May also include records of training administration such as outlines, syllabi, or attendance records.	AC	5			AC=Date of training session, after training materials are superseded, or termination of training program, as applicable.		Includes RSIN 1.1.043, 3.3.030, 5.4.007	Texas Health and Safety Code, Sec. 502.009(g) for hazardous materials training. 37 TAC Chapter 215 for police academy training.



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*ALL1835	1.1.057	Transitory Information	Records of temporary usefulness that are not an integral part of another record series on this schedule 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, are chat, text, and instant messages, telephone message notifications, drafts and working papers (except those that reflect the process of creating agency policies and procedures), and automatic replies.	AC	0			AC=Purpose of record has been fulfilled.		CAUTION: Records that document the fulfillment of the statutory obligations of U. T. System or the documentation of its functions, are unique to the agency, or are part of another record series listed on this schedule should not be assigned to this record series. The disposal of transitory information does not need to be documented.	
ACA12	1.1.000	Chronological Administrative Records		AC	20			AC=End of term.			
*ACA1178	1.1.000	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; more complete records are held by UT institutions, who are responsible for archival transfer.	
ACA1756	1.1.000	Appointments by Governor		FE	1				O		
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



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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 - Audit Project Work Papers	Working files for audits conducted by System Audit Office. For final audit reports, see AUD2222.	AC	7	0	0	AC=Publication or release of final audit findings.		CAUTION: Does not include reports issued by System Audit Office; see AUD2222.	
*AUD2222	1.1.002	Audits - Internal Audit Reports	Reports issued by System Audit Office for completed engagements, including audits, reviews, and advisory services.	AC	20	0	0	AC=Date of report.		Applies only to reports maintained by System Audit Office. Departmental copies of internal audit reports may be destroyed when no longer useful for reference.	
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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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							
*BOR1866	1.1.070	Regents' Rules and Regulations	Policies and procedures established for U. T. System by the Board of Regents. Includes final published rules as well as working files and related documentation used in creating rules.	PM							
BOR1963	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, but see Archives Note.	AC	6			AC=September 1 of odd-numbered calendar years.		ARCHIVES NOTE: The archival requirement is met by sending the final version of these reports 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.	



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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.			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.			
*BOR1975	3.1.014	Presidential Search Committee Records - Board Office	Records documenting the selection of institution presidents pursuant to Regents' Rule 20201. Includes education and employment history, certifications, professional and occupational licenses (health institutions only), news articles, and social media information.	AC	5	0	0	AC=Date of the making of the record or the personnel action involved, whichever occurs later.		NOTE: The 5-year retention period does not apply to comprehensive background check information, which should be destroyed when its immediate purpose is served.	
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)



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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							
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 - 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		
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.	



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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 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.			



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*BUD1005	4.7.008a	Grant Records	Documentation of state, federal, or other sponsored grant projects participated in or administered by UT System. May include grant authorization records, which provide evidence of the award of grants to or by agencies; awarded or non-awarded proposals; and 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).			
*OCP1000	1.1.067	Capital Improvement Project (CIP) Reports	Annual and quarterly reports of all major new construction and repair and rehabilitation projects to be implemented and funded from institution and System-wide revenue sources.	PM						NOTE: Major projects are defined in the Regents' Rules and Regulations as those with a total project cost of \$10,000,000 or more. Projects that are architecturally or historically significant are also identified as major projects regardless of cost.	



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*OCP1322	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; fiscal records; successful and unsuccessful bid documentation, and other related documentation.	AC	11	0	0	AC=Close of project. The project close date is based on the fiscal year of the final payment to the contractor.		ARCHIVES NOTE: Exempt from archival review per University Archivist (February 2023).	
*OCP1325	5.2.003a	Building Plans and Specifications	Includes architectural and engineering drawings, profiles, and blueprints of planning, design, construction, conversion, or modernization of state-owned facilities, structures, infrastructure, and systems.	LA	10	0	0		O		
*OCP1948	5.2.028	Building Contracts	Building construction contracts, surety bonds, and inspection records.	LA	10				O		
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.			



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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						
*FAC1801	5.2.012	Quotes (Supply and Repair Cost Estimates)	Quotes for minor construction and repair projects and supplies. Includes supporting documentation, as applicable.	AC	1			AC=Date received.			
*CHA2143	1.1.013	Calendars - 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.	O		
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)
CHA1269	3.1.000	Financial Disclosure and Conflict of Interest Affidavits	For the Chancellor and Presidents.	FE	3						
*CHA2161	3.1	Personnel Files - Presidents	Employment communications, assessments, compensation, and corrective or disciplinary actions.	AC	5	0	0	AC=Separation or termination of employment.			



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*CHA2116	3.1.014	Presidential Search Committee Records - Chancellor's Office	Records documenting the selection of institution presidents pursuant to Regents' Rule 20201. Includes firm proposals, coordination and planning of interviews, committee letters and meeting materials, communications, comments, feedback, onboarding, and appointment letters and announcements.	AC	5	0	0	AC=Date of the making of the record or the personnel action involved, whichever occurs later.			
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 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.	FE	3						



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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.			
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						



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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.	
*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.		CAUTION: For bids that are included in the bid evaluation process, whether successful or unsuccessful, see CNP1003.	



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*CNP1003	5.1	Contracts and Agreements – General	Records of contracts and agreements documenting legal obligations for general goods and services, land lease, and other business relationships except for building construction (see OCP1948) and certain employment contracts (see BOR1965). Includes the request and sourcing of goods and services from suppliers, such as requisitions, solicitation documentation (RFP/RFQ), vendor responses, awarded and unawarded bids, evaluation determination such as scoresheets, and notice of awards. Includes all documentation of negotiations, due diligence, terms and conditions, exhibits, non-disclosure agreements (NDA), amendments, change orders, acceptance, and final versions of contracts.	AC	7			AC=Expiration or termination of the instrument according to its terms.		NOTE: The records in this series are owned by the Executive Vice Chancellor for Business Affairs and maintained by the Office of Contracts and Procurement per Regents' Rule 10501. See item ALL2217 for contract monitoring records maintained by contract sponsors or Departmental Contract Administrators (DCA). Includes RSINs 5.1.001a-b and 5.3.007a-b.	Texas Government Code, Sec. 441.1855
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						



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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 summaries used for capital outlay budgeting, and property sale, auction, or disposal records of agency owned equipment and property.	LA	3						
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)



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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						ARCHIVES NOTE: The final report must be submitted to the Texas State Publications Depository Program per 13 TAC 3.3(a)(2)(a).	
CON1279	4.5.003	Annual Financial Report - Working Files	Working files and related documentation used to prepare the AFR.	FE	7						
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.	
*TRA1738	5.6.002	Aircraft Passenger Lists	List of passengers on an aircraft. Includes passenger manifest (snapshot of flight).	FE	3					Copies are sent to TxDOT Flight Services annually.	Texas Government Code, Sec. 2205.039
*TRA1739	5.6.001a	Aircraft Flight Logs	Logs and related documentation used to maintain information about state-owned aircraft flight data. Includes pilot manifest signed by passengers.	LA	3					Copies are sent to TxDOT Flight Services annually.	Texas Government Code, Sec. 2205.039
OEB1304	2.2.011	Employee Benefits Data Entry Logs		AC	0			AC=When reconciliation confirmed.			
OEB1309	4.5.002	Financial Statements		FE	5						



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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	Worksheets related to employee benefit operations.	FE	5						
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.			
OEB2153	3.1.000	Retirement Loan and Deferred Compensation Plan Information		AC	10			AC=After loan has been paid.			



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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	Electronic claims data kept on the mainframe.	AC	7			AC=Resolution of claim.			
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						



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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)
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.			



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GPS1753	4.1.003	Federal Tax Records	IRS Forms 5227, 1041, 1065, and similar tax records related to the Charitable Remainder Trust. Comprises copies of records received from The University of Texas/Texas A&M Investment Management Company (UTIMCO).	AC	4			AC=Tax due date, date claim is filed, or 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		



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*SPE1555	11.1.007	Special Events	Records pertaining to the administration of special events. May include records on planning and arrangements, reports, promotional and publicity materials, photographs, schedules of speakers and activities, registration and attendance lists, participant evaluations, and related documentation and correspondence.	AC	4			AC=Completion of the event.	O		
*FIN1002	4.8.001	Banking Records - Finance	Bank statements, financial statements, bank account transactions, and account analysis and collateral reports.	FE	5						
*FIN2025	4.7	Long-Term Liabilities and other Debt Instruments	Records documenting financial obligations such as debentures, loans, deferred tax liabilities, bonds, pension, and commercial paper.	AC	3			AC=Scheduled retirement of debt; bonds have been paid in full and presented to UT System Administration.		UTS 181, Sec. 9: Records Retention	



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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, superfund actions, environmental studies, or FCC licenses.	AV					O	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. 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.	



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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.	
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 and Bankruptcy Files (Nonlitigation)		AC	5	0	0	AC=Resolution of claim.			



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*OGC2118	1.1.020	Public Information Requests and Reporting	Includes all correspondence and documentation relating to requests for records that are furnished to the public or excepted under the Public Information Act (Chapter 552, Texas Government Code). Also includes records provided to the legislature under section 552.008 and reports made to the Office of Attorney General (OAG) on an agency's Public Information Act activities.	AC	2			AC=After request has been satisfied or withdrawn, date of notification that records are excepted, or date of report submission, as applicable.			Texas Government Code, Sec. 552.010
OGC2141	1.1.000	Professional Liability Enrollment, Changes, and Resignation		AC	20			AC=Date of enrollment.			
*OGR1332	1.1.027	Governmental Relations	Records documenting the relations of the agency with the legislature, elected officials, and other governmental bodies at the state, local, and federal levels. Includes documentation relating to tracking and providing input into legislation of interest to UT System, responding to legislative inquiries, preparing bill analyses and summaries, reviewing proposed legislation and related fiscal notes, and writing and preparing legislative testimony.		6						



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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.	
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.	
*ISO1000	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 does not need to 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



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*ISO2218	2.2.000	Security Incident Reporting	Reports and related information concerning security incidents affecting U. T. System or its institutions.		5					UTS 165 Standard 12	1 TAC 202.73(d)
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.			
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.	
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						



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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.			
*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 disposal of surveillance videos does not need to be documented.	
POL1529	5.6.005	Vehicle Use Reports	Includes mileage, fuel/oil consumption, passengers carried and other related operational information.	FE	3						
POL2003	1.1.067	Reports - Annual Inspections of Component Institutions		CE	10				O		
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
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).	
*RIM2123	1.2	RIM Program Compliance Records	Files demonstrating departmental and program compliance with state rules and agency policies for records and information management (RIM). May include, but is not limited to: records disposition requests and approvals, records inventories or file plans, RIM compliance checklists, and the records retention schedule including working files.		10					Includes RSIN 1.2.001, 1.2.005, 1.2.010	
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.	



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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	
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						
*RC1639	5.4.003	Inspection Records	Fire, safety, and other inspection records of agency facilities and equipment, including orders issued by inspectors to correct deficiencies in compliance with any code or regulations.	AC	3			AC=Date of inspection, or date of the correction of the deficiency if the inspection report reveals a deficiency.		CAUTION: Does not include inspection reports of building construction; see OCP1948.	



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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.			
RF1697	5.1.013	Systemwide Insurance Policies	Property and Casualty policies including supporting documentation relevant to the implementation, modification, renewal, or replacement of policies.	AC	20			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
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



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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.			
SWC1649	5.4.000	Risk Assessment and Monitoring Plans		US	5						
*SWC1980	15.5.010	Complaint Investigation Records – Title IX	Any investigation where the allegation type includes sex discrimination, sexual harassment, sexual assault, dating violence, domestic violence, stalking, or any other matter that is sexual or sex-based in nature.	AC	7			AC=Final resolution of issue and appeals.		CAUTION: If a complaint becomes the subject of litigation, it must be included in and is subject to the minimum retention period of OGC1472.	34 CFR 106.45(b)(10)
*SWC2000	1.1.006	Complaint Investigation Records - General	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: See SWC1980 if the allegation type includes sexual or sex-based misconduct. 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.			



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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	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 background check authorizations, Employment Eligibility Verification (Form I-9), employment verifications, performance management documents, employee data change forms, separation documents, and signed acknowledgement forms.	AC	5			AC=Until superseded or separation or termination of employment.		Includes RSIN 3.1.002, 3.1.011, 3.1.018, 3.1.019, 3.1.020, 3.1.021, 3.1.022, 3.1.029, 3.1.041. Convenience copies of personnel information held by a department should be retained in accordance with ALL2216.	29 CFR 1620.32(c)
HR1003	3.3.001a	Affirmative Action Plans		FE	5						29 CFR 30.8(e) for apprenticeship records



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*HR1004	3.4	Time and Leave Records	Timesheets or similar 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. Also includes employee requests and supervisor authorizations or denials for vacation, compensatory, sick, Family and Medical Leave Act (FMLA), and other types of authorized leave. May include supporting documentation, related reports, and correspondence.		4	0	0			Includes RSIN 3.4.006, 3.4.007. Emails, texts, or chats requesting and authorizing time off are considered transitory once the absence is approved in PeopleSoft.	HOP 3.3.1 and 3.4.4; Texas Government Code, Section 661.908; 40 TAC 815.106; 29 CFR 825.500(b) for FMLA
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	Records documenting number of hours transferred in and out of comprehensive sick leave pool.	FE	3						
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



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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 Plan (ORP) documents such as Vesting/Termination Status forms.	AC	75			AC=Until superseded or separation or termination of employment.			
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.			



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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.	
INN1000	4.1.006	Investment Records	Signed Horizon Fund agreements and related documentation.	AC	20			AC=Expiration or termination of agreement.			
OTIS1000	2.2.017	Help Desk Tickets	Records documenting requests for technical assistance and related correspondence.	AV	0						
*OTIS1507	1.1.000	IT Project Management	Records related to monitoring and managing the activities and progress of projects and internal initiatives, including business case, scope, project plans, budgets, schedules, close-out and lessons learned, and related correspondence. Includes projects related to the development of systems and software from initial stages through hand-off to production, including planning, requirements analysis, design, verification and testing, quality assurance and installation. Also includes training and guidance to manage change related to rolling out new internal initiatives or tools.	AC	6			AC=Completion of project.			



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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						
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						The disposal of monitoring records that are automatically overwritten does not need to be documented.	



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OTIS2141	5.2.008	Equipment History	Equipment history file, which may include logbooks and requests for installation, moves, service, repair, etc.	LA	7						
*OTIS2220	2.1	Information Systems Administration	Hardware/software records related to the detailed, as-built design or major modifications (e.g., patches, upgrades, etc.) of technology systems and software applications. Including but not limited to technical documentation, architecture, source code, data models, data standards, registries, data definitions and dictionaries, and software documentation (e.g., user guides).	AC				AC=Completion or termination of program or system and records are transferred to and made usable in a new software environment.		CAUTION: This item DOES NOT apply to content or data within a system or application; these should be filed according to their record value, regardless of media. Includes RSIN 2.1.007, 2.1.008, 2.1.009	13 TAC 6.94
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
MED1001	1.1.058	JAMP Council Meetings – Agenda, Minutes, and Supporting Documentation		PM						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.			



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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 at the expiration of the retention period.	
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.	
MED1006	1.3.002	Media Production Files	Images, sound clips, or other design elements used in the production of media recordings.	AV	0				O		
*MED1007	1.1.061	JAMP Council Meetings - Notes	Notes taken during the meetings from which written minutes are prepared.	AC			90	AC=Approval of the written minutes of the meeting by the JAMP Council.			



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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	TMDSAS Student Applications	Applications submitted to the Texas Medical & Dental Schools Application Service and all supporting documentation.	AC	10			AC=End of application cycle.			
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						
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						



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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						
ULA1017	1.1.000	Well Tickets	Historical information used for exploration and development of oil and gas resources.	AV	0						
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.			



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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						
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	4.1.001	Purchasing Journal Vouchers		FE	3						
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						



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ULB1015	5.6.005	Vehicle Use Reports	Includes mileage, fuel/oil consumption, passengers carried and other related operational information.	FE	3						
ULE1001	1.1.000	Technical Well Files		PM							
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						
ULT1001	5.1.000	Lease Maps	Used for exploration and compliance.	US	0					Maps are paper and Mylar film.	Texas Education Code, Sec. 66.77
ULT1002	5.1.000	Maps of University Lands	Project files used to create hard copy maps.	US	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.			
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
ULL1003	5.1.001	Lease Assignment Briefs		PM							



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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						
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							
ULR1007	5.2.000	Water Books/Management Records		PM						Maintained permanently for environmental and historical purposes.	



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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		AC	30			AC=Date created.		Midland record is sole record.	



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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
GPS	Gift Admin., Compliance, & Advancement Services	SIS	Shared Information Services
HEA	Office of Health Affairs	SWC	Office of Systemwide Compliance
HR	Human Resources (also "OTI")	SPE	External Relations/Events Office
HUB	Historically Underutilized Business Programs	TRA	CON/Travel Services and Aircraft Operations
INN	Innovation and Strategic Investment	ULA	University Lands/Accounting (also "ULAO")
ISO	Information Security Office	ULB	University Lands/Budget and Revenue
JAMP	Joint Admission Medical Program	ULE	University Lands/Engineering
MED	Texas Medical and Dental Schools Application Service	ULG	University Lands/Geology
OCP	Office of Capital Projects (also "OFPC")	ULL	University Lands/Land
OEB	Office of Employee Benefits	ULR	University Lands/Right of Way
OFPC	Office of Capital Projects (also "OCP")	ULS	University Lands/Surface
OGC	Office of General Counsel	ULT	University Lands/Information Technology



The University of Texas System

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>
