



STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code	768	3. Agency Name Texas Tech University System						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total	9. Remarks		

Category 3: Personnel Records Section 3.1 – Employee							
3.1.001	28	Applications for Employment - Not Hired Applications, resumes, transcripts, letters of reference, and similar documents whose submission by candidates for vacant positions is required on the application form, by application procedures, or in the employment advertisement.	2		2	29 CFR 1602.49(a)	
3.1.002	27	Applications for Employment - Hired Applications, resumes, transcripts, letters of reference, and similar documents whose submission by candidates for vacant positions is required on the application form, by application procedures, or in the employment advertisement.	AC + 5		AC + 5	AC = Termination of employment.	
3.1.006	91	Counseling Records Notes, memoranda, or reports relating to the counseling of an employee for work-related, personal, or substance abuse problems. Usually maintained at the supervisory level except in those agencies with counseling staff.	AC + 3		AC + 3	AC = Termination of counseling.	

Retention Codes (Field 7)	Archival Codes (Field 8)
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3.1.011	117	Employee Insurance Records Agency copies of information relating to the selection by employees of life, disability, health, and other types of insurance offered by the State of Texas to its employees.	AC		AC		AC = Until superseded or termination of employment. CAUTION: Documents that serve as payroll deduction authorizations must be maintained for the retention period prescribed for item number 3.2.001.	
3.1.012	119	Employment Advertisements/Announcements Internal or external announcements or advertisements of job openings, promotions, training programs, or opportunities for overtime.	2		2		29 CFR 1602.49(a)	
3.1.013	121	Employment Contracts	AC + 4		AC + 4		AC = Expiration or termination of the contract according to its terms.	
3.1.014	122	Employment Selection Records Includes notes of interviews with candidates, questions asked of applicants, audio and videotapes of job interviews, driving record and previous injury checks, pre-employment physical examinations, pre-employment drug screening test results, polygraph examination results; and all other records that document the selection process.	2		2		29 CFR 1602.49(a) CAUTION: Does not include criminal history checks. See 3.1.026.	

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3.1.018	159	Grievance Records Records relating to the review of employee grievances against personnel policies, working conditions, etc.	AC + 2		AC + 2	AC = Final decision on the grievance. CAUTION: Does not include formal complaints filed by an agency employee with the Equal Employment Office (EEO) of the U. S. Department of Labor. See 1.1.048.		
3.1.019	247	Performance Appraisals - Staff and Non-Tenure Track	2		2	29 CFR 1620.32(c)		
3.1.019	248	Performance Appraisals - Teaching Assistant [non-faculty]	AC + 3		AC + 3	AC = Completion of teaching course or lab. 29 CFR 1620.32(c)		
3.1.019	249	Performance Appraisals - Tenure Track	6		6	29 CFR 1620.32(c)		
3.1.020	250	Personnel Corrective Action Documentation Corrective actions are those actions which do not affect pay, status, or tenure and are imposed to correct or improve an employee's job performance.	AC + 5		AC + 5	AC = Termination of corrective action. CAUTION: If, during the retention period of this records series, any part of this series is used to document and support personnel disciplinary action under item number 3.1.021, all documentation from this series used to support disciplinary action must be retained for the the minimum retention period described by item number 3.1.021.		

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3.1.021	251	Personnel Disciplinary Action Documentation Disciplinary actions are those actions which may affect pay, status, or tenure. They are imposed to discipline an employee whose conduct is harmful to the best interests of the state, the agency, or the employee work force, and for failure to improve performance or conduct following imposition of corrective action. May include cause for demotion, suspension, or dismissal, and the reasons for failure to give written notice of resignation. May also be used to document evidence of employee self-improvement efforts, as well as favorable and unfavorable communication.	AC + 5		AC + 5		AC = Termination of employment.	
3.1.022	252	Personnel Information or Action Forms Forms or similar records used to create or change information concerning the records of an employee including pay grade, position classification, employee number, evaluation date, and termination of employment.	2		2		29 CFR 1602.49(a)	

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3.1.023	276	Position/Job Descriptions Job descriptions, including all associated task or skill statements, for positions in an agency.	AC + 4		AC + 4	AC = Until superseded or job eliminated. 40 TAC 815.106(i).		
3.1.024	212	Physical Examinations – Drug Testing Records	AC + 2		AC + 2	AC = Termination of employment. CAUTION: Does not include pre-employment physical examinations. SEE number 3.1.014.		
3.1.024	216	Physical Examinations/Medical Reports Medical or physical examination reports or certificates of employees for whom periodic monitoring of health or fitness is required.	AC + 2		AC + 2	AC = Until superseded or termination of employment. CAUTION: Does not include pre-employment physical examinations. SEE number 3.1.014.		
3.1.026	323	Security Clearances/Criminal History Checks Criminal history record information on job applicants or agency employees obtained from the Department of Public Safety (DPS).	AC		AC	AC = End of the probationary term of the individual's employment or, if the individual is not hired for a security-sensitive position, after the information is used for its authorized purpose. Government Code § 411.094(e)		
3.1.027	431	Training and Educational Achievement Records (Individual) Certificates of completion, licenses, transcripts, test scores, or similar records documenting the training, testing, or continuing education achievements of an employee.	AC + 5		AC + 5	AC = Termination of employment.		

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Archival Codes (Field 8)

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			Agency	Storage	Total	9. Remarks		
3.1.029	107	Documentation or Verification of Citizenship Federal reporting Form I-9.	AC + 1		AC + 1		AC = Termination of employment. 8 CFR 274a.2(b)(2)(i)(A) and (c)(2). CAUTION: Federal regulation requires that I-9 forms be retained for 3 years from date of hire or 1 year after separation of the employee, whichever later. Agencies should make certain that the I-9 forms for employees who terminate from an agency less than 3 years from date of hire are kept for the 3 year retention period.	
3.1.031	114	Employee Benefits - Other than Insurance Agency copies of information relating to the selection of available benefit options other than insurance.	AC + 2		AC + 2		AC = Until superseded or termination of employment. CAUTION: Documents that serve as payroll deduction authorizations must be maintained for the retention period prescribed for item number 3.2.001.	
3.1	50	Biographical Records - Resumes of Employees	AC + 1		AC + 1	O	AC = Termination of employment.	
3.1.034	51	Biographical Records - Resumes Not Solicited	AV		AV		Retention period applies if an agency replies to the sender of a resume that it will be kept on file should future job openings occur. See item number 3.1.014 for resumes, whether solicited or unsolicited, that are used in any way in the employment selection process.	

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			Agency	Storage	Total	9. Remarks		
3.1.035	413	Surety/Performance Bonds Bonds posted by employees and individuals or entities under contract with an agency for the performance of the duties of a position or the terms of a contract with the agency.	AC + 4		AC + 4	AC = Expiration or termination of the bond according to its terms. CAUTION: Does not include construction or architectural surety bonds. SEE item number 5.2.028.		
3.1.036	346	Apprenticeship Records Summary of applicant qualifications, evaluation basis for selection or rejection, original applications, job assignments, promotions, separations, layoffs, terminations, compensation records, conditions of work, time records, hours of training provided (separate from labor), minority status, and gender of all selected and rejected applicants.	5		5	29 CFR 30.8(e). 5 years retention unless otherwise stipulated by accreditation requirements, whichever is the longer of the two retention periods.		
3.1.037	118	Employee Recognition Records Awards, incentives, tenure, etc.	AC + 5		AC + 5	AC = Termination of employment.		
3.1.038	283	Public Access Option Form Form completed and signed by employee or official, or former employee or official, electing to keep home address, home telephone number, social security number, and family information open or confidential under the Public Information Act, Government Code §552.024.	US		US	SEE item number 3.3.011.		

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			Agency	Storage	Total			
3.1.039	229	Ombudsman Records Consultation records, notes, letters, memos, emails, reports and other documentation.	AC		AC	AC = Final decision or matter closed. CAUTION: Does not include formal complaint filed with EEO. If matter becomes a grievance or the subject of counseling or litigation, or employee is subject to disciplinary action, the records are subject to retention is the appropriate records series. SEE 1.1.048, 3.1.006, 3.1.018, 3.1.020, and 3.1.021.		

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Category 3: Personnel Records Section 3.2 – Payroll							
3.2.001	115	Employee Deduction Authorizations Documentation used to start, modify, or stop all voluntary or required deductions from payroll, including garnishment or other court-ordered attachments.	AC + 4		AC + 4	AC = After termination of employee or after amendment, expiration, or termination of authorization, whichever sooner.	
3.2.002	116	Employee Earnings Records Includes payroll notification letters	4		4	40 TAC 815.106(i).	
3.2.003	143	Federal Tax Records Includes 1099, W2, FICA, and other tax records.	AC + 4		AC + 4	AC = Tax due date, date the claim is filed, or date tax is paid whichever is later. 26 CFR 31.6001 - 1(e)(2).	
3.2.004	168	Income Adjustment Authorizations Used to make increases or decreases to employees' gross pay, FICA, retirement, or in the computation of taxes.	2		2	29 CFR 516.6(c).	
3.2.005	446	W-4 Forms Employer's copy of "Employee's Withholding Exemption Certificate."	AC + 4		AC + 4	AC = Until superseded, obsolete, or upon separation of employee. 26 CFR 31.6001-1 (e)(2).	
3.2.006	447	Wage Rate Tables	2		2	29 CFR 516.6(a)(2).	
3.2.007	436	Unemployment Claim Records	AC + 5		AC + 5	AC = After claim filed.	
3.2.007	437	Unemployment Compensation Records	AC + 5		AC + 5	AC = After compensation paid or rejected.	
3.2.008	104	Direct Deposit Application/Authorizations	US		US		

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3.2.009	332	State Deferred Compensation Records	AC + 5		AC + 5	AC = All accounts with a vendor or vendors for the individual participant have been closed. For instructions regarding the determination of the closure of accounts and for additional information regarding the retention period see the most current edition of the <i>Benefits Coordinator Reference Manual</i> issued by the Employees Retirement System of Texas.		
3.2.010	164	Human Resources Information System (HRIS) Reports Includes supporting documentation.	AC + 4		AC + 4	AC = Issuance of report.		
3.2	245	Payroll- Cover Sheets/Notifications for Hourly Payroll	FE + 3		FE + 3			
3.2	246	Payroll- Zero Bills not written to history report	3 months		3 Months			

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Category 3: Personnel Records Section 3.3 – Personnel Administration							
3.3.001	18	Affirmative Action Plans Affirmative action plans for both regular employees and apprenticeship programs.	5		5		29 CFR 30.8(e) for apprenticeship plans.
3.3.004	44	Benefit Plans Employee benefit plans such as pension; life, health, and disability insurance; deferred compensation; etc., including amendments.	US + 1		US + 1		29 CFR 1627.3(b)(2).
3.3.010	187	Labor Statistics Reports Reports providing statistical information on labor force.	3		3		
3.3	145	Former Employee Verification Records - Departmental Only Departmental copies of employee information.	AC + 5		AC + 5		AC = Termination of employment. See also item 146 for Human Resources office copy.
3.3.011	146	Former Employee Verification Records – Human Resources Office Only Minimum information needed to verify employment, includes name, social security number, exact dates of employment, last known address and most recent public access option form.	AC + 75		AC + 75		AC = Termination of employment. See also item 145 for departmental office copy.

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3.3.015	277	Positions/Job Classification Review File Records relating to review and monitoring of job classifications within an agency.	US + 3		US + 3			
3.3.020	449	Work Schedules/Assignments Work, duty, shift, crew, or case schedules, rosters, or assignments.	1		1			
3.3.022	424	Texas Workforce Commission (TWC) Reports Reports to the agency from TWC or its predecessor pertaining to employees.	3		3			
3.3.023	434	Travel and Reimbursable Activities - Requests and Authorizations to Engage in 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		FE + 3			
3.3.024	274	Policies and Procedures - Personnel Any internally distributed manuals, guidelines, or similar records that define agency wide policies and procedures concerning the personnel of an agency.	US + 3		US + 3			

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3.3.025	179	Job Procedure Records Any documents detailing the procedural duties and responsibilities of agency positions on a position-by-position basis.	US + 3	US + 3			
3.3.026	22	Agency Staffing Reports Any reports compiled by an agency on aspects of personnel staffing, including listings of all staff by program or name, staff hired during a month, detailed listings of employees within its organizational structure, position vacancies, analyses of turnover rates and seasonality of employment, etc.	US + 3	US + 3			
3.3.027	30	Aptitude and Skills Tests Aptitude or skills tests required of job applicants or of current personnel to qualify for promotion or transfer.	US + 2	US + 2		29 CFR 1602.49 CAUTION: One copy of each different test (different in terms of either questions or administration procedures) should be retained for the period indicated.	
3.3.028	31	Aptitude and Skills Tests (Test Papers) Aptitude and skills test papers of job applicants or of current personnel taking a test to qualify for promotion or transfer.	2	2		29 CFR 1602.49	

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3.3.030	428	Training Administration Records Instructional materials and other records associated with in-house training of agency personnel on personnel policies and procedures and other policies and procedures that govern an agency's programs, services, or projects.	US + 2		US + 2		CAUTION: Does not include hazardous material training records. See 5.4.007.	
3.3.031	108	EEO Reports and Supporting Documentation Includes documentation used to complete EEO reports.	3		3		29 CFR 1602.32, 1602.39, 1602.41, 1602.48, and 1602.50.	
3.3.032	124	Equal Pay Records Reports, studies, aggregated or summary data, and similar documentation compiled to monitor and demonstrate compliance with the federal Equal Pay Act.	3		3		29 CFR 1620.32.	
3.3	112	Employee Affidavits	AC + 5		AC + 5		AC = Until superseded or until termination of employment.	
3.3	120	Employee Confidentiality Forms	AC		AC		AC = Until superseded or until termination of employment.	
3.3	253	Personnel Office - New Position/Reclassification Letters	PM		PM			
3.3	254	Personnel Office - Veterans' Preference Documents	PM		PM			

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Category 3: Personnel Records Section 3.4 – Time and Leave								
3.4.001	14	Accumulated Leave Adjustment Requests Used to create employee leave balances, to transfer leave balances when an employee transfers positions, to adjust carry-over balances on August 31, to correct errors on leave accumulation, and to close out leave accounts on separated employees.	FE + 3		FE + 3			
3.4.002	188	Leave Status Reports Cumulative report is issued each pay cycle and provides employee leave status information for each position.	FE + 3		FE + 3			
3.4.003	192	Less Than Full-Time Worked Reports Dates and hours.	4		4		40 TAC 815.106(i).	
3.4.004	240	Overtime Authorizations	2		2			
3.4.005	241	Overtime Schedules	2		2			
3.4.006	426	Time Cards and Time Sheets	4		4		40 TAC 815.106(i).	
3.4.007	427	Time Off and/or Sick Leave Requests	FE + 3		FE + 3			
3.4.008	325	Sick Leave Pool Documentation Requests submitted, approvals, number of hours transferred in and out, etc.	FE + 3		FE + 3			

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