## State of Texas
### Records Retention Schedule

**Recertified:** 5/23/2012  **Updated (with or without amendment):** 10/3/2017  **Amendment Approved:** 2/19/2014

Automated Facsimile of SLR-105

<table>
<thead>
<tr>
<th>2. Agency Code:</th>
<th>3. Agency: Texas Department of State Health Services</th>
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<tr>
<td><strong>102</strong></td>
<td>OFFICE OF THE GENERAL COUNSEL - LEGAL SECTION</td>
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<tr>
<td>4445</td>
<td>BOARD OF HEALTH RESOLUTIONS &amp; RELATED DOCUMENTS</td>
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<tr>
<td>4446</td>
<td>TEXAS REGISTER &quot;OPEN MEETINGS&quot; &amp; &quot;IN ADDITION&quot;</td>
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<td>4450</td>
<td>CERTIFICATIONS BY CUSTODIAN OF RECORDS</td>
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<td>6164</td>
<td>SUBPOENAS (DSHS IS NOT A PARTY TO THE LITIGATION)</td>
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### RETENTION CODES (Field 7)
- AC - After Closed, Terminated, Completed, Expired, Settled
- AV - As Long As Administratively Valuable
- DA - Days
- CE - Calendar Year End
- FE - Fiscal Year End
- LA - Life of Asset
- MO - Months
- PM - Permanent
- US - Until Superseded

### ARCHIVAL CODES (Field 8)
- A - Transfer to State Archivist
- E - Exempt from sending
- R - Review by State Archivist

### VITAL Record (Include in Field 9)
- V - Vital Record
### Records Retention Schedule

**State of Texas**  
**Office of the General Counsel - Legal Section**

**Updated**: 10/3/2017  
**Recertified**: 5/23/2012  
**Amendment Approved**: 2/19/2014

**Agency**: Texas Department of State Health Services  
**Agency Code**: 537

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<thead>
<tr>
<th>Field 1</th>
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<th>Field 4</th>
<th>Field 5</th>
<th>Field 6</th>
<th>Field 7</th>
<th>Field 8</th>
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<tr>
<td>1.1</td>
<td>7202</td>
<td>OTHER HIPAA PRIVACY DOCUMENTATION (INCLUDING LETTERS, MEMOS, FORMS)</td>
<td>6</td>
<td>6</td>
<td>45 CFR 164.530 (j)(1)-(2)</td>
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<td>1.1</td>
<td>7205</td>
<td>ACCESS TO HIPAA-AFFECTED INFORMATION - DENIED</td>
<td>AC+6</td>
<td>AC+6</td>
<td>45 CFR 164.530 (j)(1)-(2); AC=DATE OF DENIAL OF INFORMATION</td>
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<td>7208</td>
<td>AMENDMENT AND OTHER PRIVACY-RELATED REQUESTS-HIPAA (FOR RESTRICTIONS, ALTERNATE FORMATS/LOCATIONS, ETC.) - APPROVED</td>
<td>AC+1</td>
<td>AC+1</td>
<td>AC=DATE RECORD AMENDED OR REQUEST FILLED.</td>
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<td>AMENDMENT AND OTHER PRIVACY-RELATED REQUESTS-HIPAA (FOR RESTRICTIONS, ALTERNATE FORMATS/LOCATIONS, ETC.) - APPROVED</td>
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<td>AC=DATE RECORD AMENDED OR REQUEST FILLED.</td>
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<td>7211</td>
<td>AMENDMENT AND OTHER PRIVACY-RELATED REQUESTS-HIPAA (FOR RESTRICTIONS, ALTERNATE FORMATS/LOCATIONS, ETC.) - DENIED</td>
<td>AC+6</td>
<td>AC+6</td>
<td>45 CFR 164.530 (j)(1)-(2); AC=DATE OF DENIAL OF INFORMATION</td>
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<td>1.1.006</td>
<td>7214</td>
<td>COMPLAINTS RELATED TO PRIVACY (HIPAA)</td>
<td>AC+6</td>
<td>AC+6</td>
<td>45 CFR 164.530 (j)(1)-(2); AC=FINAL DISPOSITION OF COMPLAINT</td>
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<td>1.1.007</td>
<td>4394</td>
<td>CORRESPONDENCE, ADMINISTRATIVE (LIMITED TO FORMULATION, PLANNING, IMPLEMENTATION, INTERPRETATION, MODIFICATION, OR REDEFINITION OF THE PROGRAMS, SERVICES OR PROJECTS &amp; THE ADMINISTRATIVE REGULATIONS, POLICIES AND PROCEDURES THAT GOVERN THEM.)</td>
<td>2</td>
<td>2</td>
<td>4</td>
<td>R</td>
<td>Vital Record. ONLY ADMINISTRATIVE CORRESPONDENCE OF EXECUTIVE STAFF, BOARD OR COMMISSION MEMBERS, DIVISION DIRECTORS AND SECTION/UNIT/BANCH HEADS REQUIRE ARCHIVAL REVIEW.</td>
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<td>GENERAL CORRESPONDENCE (LIMITED TO DOCUMENTING THE ROUTINE OPERATIONS OF THE POLICIES, PROGRAMS, SERVICES OR PROJECTS.)</td>
<td>2</td>
<td>2</td>
<td>INCLUDES SOME E-MAIL.</td>
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**Retention Codes (Field 7)**

- **AC** - After Closed, Terminated, Completed, Expired, Settled  
- **AV** - As Long As Administratively Valuable  
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- **US** - Until Superseded  
- **A** - Transfer to State Archivist  
- **R** - Review by State Archivist  
- **E** - Exempt from sending  

**Archival Codes (Field 8)**

- **R** - Review by State Archivist  
- **E** - Exempt from sending  

**VITAL Record** (Include in Field 9)
## Records Retention Schedule

**State of Texas**  
**Records Retention Schedule**

**Recertified: 5/23/2012**  
**Updated (with or without amendment): 10/3/2017**  
**Amendment Approved: 2/19/2014**

**Automated Facsimile of SLR-105**

|---------|-----------|------------------------|-----------------------------------------------|-------------------------------|

2. **Agency Code: 537**  
3. **Agency: Texas Department of State Health Services**

### 4. Records Series Item #  
5. **Agency:**  
6. **Records Series Title:**

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<th>Remarks</th>
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8. **Archival**  
9. **Remarks**

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1. **1.1.013**  
2. **6062**  
3. **CALENDARS/APPOINTMENT BOOKS/ITINERARY**  
4. **CE+1**  
5. **CE+1**  
6. **R**  
7. **INCLUDES OUTLOOK CALENDAR, ONLY CALENDARS, APPOINTMENT, AND ITINERARY RECORDS OF EXECUTIVE STAFF, BOARD OR COMMISSION MEMBERS, DIVISION DIRECTORS AND SECTION/UNIT/BRANCH HEADS REQUIRE ARCHIVAL REVIEW.**

1. **1.1.014**  
2. **4398**  
3. **LEGAL OPINIONS & ADVICE**  
4. **AV**  
5. **AV**  
6. **R**

1. **1.1.020**  
2. **4400**  
3. **PUBLIC INFORMATION REQUESTS - NOT EXEMPTED**  
4. **AC+1**  
5. **AC+1**

1. **1.1.021**  
2. **4401**  
3. **PUBLIC INFORMATION REQUESTS - EXEMPTED**  
4. **AC+1**  
5. **1**  
6. **AC+2**  
7. **AC=DATE OF DENIAL OF REQUEST**

1. **1.1.023**  
2. **5227**  
3. **ORGANIZATION CHARTS**  
4. **US**  
5. **US**  
6. **A**

1. **1.1.026**  
2. **5229**  
3. **TEXAS REGISTER SUBMISSIONS**  
4. **AC+1**  
5. **AC+1**  
6. **AC=DATE OF PUBLICATION IN THE TEXAS REGISTER**

1. **1.1.027**  
2. **4402**  
3. **PROPOSED LEGISLATION**  
4. **AV**  
5. **AV**

1. **1.1.040**  
2. **5230**  
3. **SPEECHES AND PAPERS**  
4. **AC**  
5. **AC**  
6. **R**  
7. **AC=END OF TERM IN OFFICE OR TERMINATION OF SERVICE IN A STATE POSITION.**

1. **1.1.043**  
2. **4406**  
3. **TRAINING MATERIALS**  
4. **US+1**  
5. **US+1**

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**ARCHIVAL CODES (Field 8)**

R - Review by State Archivist
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A - Transfer to State Archivist

**VITAL Record (Include in Field 9)**
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1.1.048 4410 LITIGATION FILES AC+1 AC+1 R INFORMATION CONTAINED IN FILES DETERMINES IF THE FILE IS OPEN OR CONFIDENTIAL. PAPER & ELECTRONIC. 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 OF WANT OF PROSECUTION OR ON A MOTION OF THE PLAINTIFF; OR FINAL DECISION OF A COURT (OR OF A COURT ON APPEAL, IF APPLICABLE) IN A LAWSUIT. CASES THAT SET LEGAL PRECEDENT OR EXHIBIT HISTORICAL VALUE WILL BE EVALUATED BY THE ARCHIVES AND INFORMATION SERVICES DIVISION OF THE TEXAS STATE LIBRARY AND ARCHIVES COMMISSION FOR ARCHIVAL PRESERVATION.

1.1.053 2090 REGISTRATION LOGS AC AC AC=REPORT FILED WITH THE TEXAS ETHICS COMMISSION.

1.1.057 1680 TRANSITORY INFORMATION AC AC AC=PURPOSE OF RECORD HAS BEEN FULFILLED. INCLUDES TELEPHONE MESSAGE NOTIFICATIONS & SOME E-MAIL CONTAINING ROUTINE INFORMATION USED FOR COMMUNICATION, BUT NOT FOR THE DOCUMENTATION OF A SPECIFIC AGENCY TRANSACTION.

1.1.063 5226 STAFF MEETING MINUTES 1 1

1.1.067 4404 REPORTS AND STUDIES--NON-FISCAL 2 1 3

1.1.072 5851 PUBLIC INFORMATION REPORTS 2 2 REPORTS MADE TO TBPC ON AGENCY'S PUBLIC INFORMATION ACT ACTIVITIES.

1.1.075 51 ALTERNATIVE DISPUTE RESOLUTIONS - FINAL AGREEMENT AC+4 AC+4 AC=DATE OF FINAL AGREEMENT. TEXAS CIVIL PRACTICE AND REMEDIES CODE, CHAPTER 154.071

**RECORDS AND ARCHIVAL CODES**

<table>
<thead>
<tr>
<th>RETENTION CODES (Field 7)</th>
<th>ARCHIVAL CODES (Field 8)</th>
<th>VITAL Record (Include in Field 9)</th>
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<td>MO - Months</td>
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<td>DA - Days</td>
<td>LA - Life of Asset</td>
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<td>Agency: Texas Department of State Health Services</td>
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<td>1.2.001 4412</td>
<td>DESTRUCTION SIGN OFF FORMS</td>
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<td>1.2.005 4413</td>
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<td>RECORDS DISPOSITION LOGS</td>
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<td>102 - OFFICE OF THE GENERAL COUNSEL - LEGAL SECTION</td>
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#### 2.1.007  4419 SOFTWARE PROGRAMS
- **Retention Period:** AC
- **Archival:** AC
- **Remarks:** Vital Record. DOES NOT INCLUDE COMMERCIALY AVAILABLE SOFTWARE PROGRAMS. 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. 13 TAC 6.94

#### 2.1.009  4418 TECHNICAL DOCUMENTATION
- **Retention Period:** AC
- **Archival:** AC
- **Remarks:** Vital Record. AC=UNTIL ELECTRONIC RECORDS ARE TRANSFERRED TO AND MADE USABLE IN A NEW HARDWARE OR SOFTWARE WITH NEW DOCUMENTATION OR THERE ARE NO ELECTRONIC RECORDS BEING RETAINED TO MEET AN APPROVED RETENTION PERIOD THAT REQUIRE THE DOCUMENTATION TO BE RETRIEVED AND READ.

#### 2.2.016  5957 SOFTWARE REGISTRATIONS, WARRANTIES, AND LICENSE AGREEMENTS
- **Retention Period:** LA+3
- **Archival:** LA+3
- **Remarks:** Vital Record.

#### 3.1  6678 POSITIVE PERFORMANCE RECORDS (MAINTAINED BY SUPERVISORS)
- **Retention Period:** AC
- **Archival:** AC
- **Remarks:** AC=FIRST LEVEL REMINDER IS 3 MONTHS; SECOND LEVEL REMINDER IS 6 MONTHS WITH A COPY TO EMPLOYEE’S MASTER EMPLOYEE FILE; THIRD LEVEL REMINDER IS 12 MONTHS WITH A COPY TO EMPLOYEE’S MASTER EMPLOYEE FILE. BEGINNING AUGUST 2005 SUPERVISORS USE Employee Development Notes IN CAPPS TO DOCUMENT SECOND AND THIRD LEVEL REMINDERS, BUT A PAPER COPY IS STILL FORWARDED TO HHSC HR FOR EMPLOYEE’S MASTER PERSONNEL FILE.

#### 3.1.006  1955 EMPLOYEE COUNSELING RECORDS
- **Retention Period:** AC+3
- **Archival:** AC+3
- **Remarks:** AC=TERMINATION OF COUNSELING. KEEP THIS RECORD SEPARATE FROM PERFORMANCE APPRAISAL.

#### 3.1.012  1948 EMPLOYMENT OPPORTUNITY ANNOUNCEMENTS
- **Retention Period:** 2
- **Archival:** 2

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<td>3.1.014 4425</td>
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<td>EMPLOYMENT SELECTION RECORDS / NOTES (INCLUDES APPLICATIONS FOR EMPLOYMENT-NOT HIRED)</td>
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<td>Vital Record maintained by CAPPS only. Send all records to CAPPS. CAPPS HAS FULLY ASSUMED THIS FUNCTIONALITY AS OF SEPT 2006.</td>
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<td>3.1.018 4423</td>
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<td>GRIEVANCE RECORDS</td>
<td>AC+2</td>
<td>AC+2</td>
<td>Vital Record maintained only by HHS-Civil Rights. MAY CONTAIN CONFIDENTIAL DATA: AC=FINAL DECISION ON GRIEVANCE. BECAUSE OF CONSOLIDATION OF HUMAN RESOURCES IN HHS ENTERPRISE, MAINTAINED IN HHS-CIVIL RIGHTS</td>
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<td>3.1.019 4426</td>
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<td>PEFORMANCE APPRAISALS/JOURNALS</td>
<td>AC+5</td>
<td>AC+5</td>
<td>MAY CONTAIN SOME CONFIDENTIAL INFORMATION SUCH AS MEDICAL INFORMATION, SOCIAL SECURITY NUMBER, OR OTHER DATA PROTECTED BY THE PRIVACY DOCTRINE. AC=TERMINATION OF EMPLOYEE. CAPPS ASSUMED THIS FUNCTIONALITY IN AUGUST 2005. HHS-HR MUST RECEIVE ALL PERFORMANCE APPRAISALS THAT ARE NOT ALREADY IN CAPPS. HHS-OGC REQUESTED LONGER RETENTION PERIOD.</td>
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<tr>
<td>3.1.023 4428</td>
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<td>POSITION DESCRIPTIONS</td>
<td>AC+4</td>
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<td>Vital Record. AC=UNTIL SUPERSEDED OR JOB ELIMINATED. AccessHR ASSUMED THIS FUNCTIONALITY IN AUGUST 2005.</td>
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<td>3.3.023 5837</td>
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<td>TRAVEL AUTHORIZATION REQUESTS</td>
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<td>TRAVEL OFFICE ASSUMED RETENTION OF THIS RECORD BEGINNING OCTOBER 2005.</td>
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<td>3.4.004 5014</td>
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<td>OVERTIME AUTHORIZATIONS</td>
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<td>BEGINNING OCTOBER 2005, RECORDS KEPT IN CAPPS.</td>
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<td>3.4.007 4435</td>
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<td>TIME OFF/SICK LEAVE REQUESTS</td>
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**RETENTION CODES (Field 7)**
- AC - After Closed, Terminated, Completed, Expired, Settled
- AV - As Long As Administratively Valuable
- US - Until Superseded
- CE - Calendar Year End
- FE - Fiscal Year End
- PM - Permanent
- LA - Life of Asset
- MO - Months
- DA - Days

**ARCHIVAL CODES (Field 8)**
- A - Transfer to State Archivist
- R - Review by State Archivist
- E - Exempt from sending

**VITAL Record (Include in Field 9)**
### Records Retention Schedule

**State of Texas**  
**Records Retention Schedule**

**Recertified: 5/23/2012**  
**Updated (with or without amendment): 10/3/2017**  
**Amendment Approved: 2/19/2014**

Automated Facsimile of SLR-105

2. **Agency Code**: 537  
3. **Agency**: Texas Department of State Health Services

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