

State of Texas
Records Retention Schedule

Recertified: 5/23/2012 **Updated (with or without**
Amendment Approved: 2/19/2014 **amendment): 10/4/2017**

ORIGINAL SUBMISSION
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 ADDENDUM PAGE

Automated Facsimile of SLR-105

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

4. Records Series Item #	5. Agency Item #	6. Records Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.
			Agency	Storage	Total			

830 - INFORMATION TECHNOLOGY SECTION

	4575	INTRANET PUBLICATIONS		AV		AV		
1.1	5	LOG FILE REPORTS		AV		AV		
1.1	1809	INTERNET APPLICATION FORMS		US		US		
1.1	2095	PEOPLESOFT FILES/RECORDS		4		4	A	Vital Record.
1.1.004	1597	LEGISLATIVE APPROPRIATION REQUEST		AC+6		AC+6	A	AC=SEPTEMBER 1 OF ODD-NUMBERED CALENDAR YEARS. ONLY COPIES OF SUPPORTING DOCUMENT SUBMITTED TO THE LEGISLATIVE BUDGET BOARD ARE ARCHIVAL.
1.1.007	898	CORRESPONDENCE, ADMINISTRATIVE (LIMITED TO FORMULATION, PLANNING, IMPLEMENTATION, INTERPRETATION, MODIFICATION, OR REDEFINITION OF THE PROGRAMS, SERVICES OR PROJECTS & THE ADMINISTRATIVE REGULATIONS, POLICIES AND PROCEDURES THAT GOVERN THEM.)		4		4	R	Vital Record. ONLY ADMINISTRATIVE CORRESPONDENCE OF EXECUTIVE STAFF, BOARD OR COMMISSION MEMBERS, DIVISION DIRECTORS AND SECTION/UNIT/BRANCH HEADS REQUIRE ARCHIVAL REVIEW.
1.1.008	899	GENERAL CORRESPONDENCE (LIMITED TO DOCUMENTING THE ROUTINE OPERATIONS OF THE POLICIES, PROGRAMS, SERVICES OR PROJECTS.)		2		2		INCLUDES SOME E-MAIL.
1.1.010	1602	DIRECTIVES (DOCUMENTATION THAT OFFICIALLY INITIATES, RESCINDS OR AMENDS GENERAL OFFICE PROCEDURES.)		US+1		US+1		(INITIATES, RESCINDS OR AMENDS GENERAL OFFICE PROCEDURES.)

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US -Until Superseded

CE - Calendar Year End
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LA - Life of Asset

PM - Permanent

MO - Months
DA -Days

ARCHIVAL CODES (Field 8)

A - Transfer to State Archivist
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1.1.013	1605	CALENDARS, APPOINTMENT, AND ITINERARY RECORDS	CE+1	CE+1	R	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.
1.1.014	837	LEGAL OPINIONS & ADVICE: OFFICE OF GENERAL COUNSEL/ATTORNEY GENERAL'S OFFICE	AV	AV	R	
1.1.020	67	PUBLIC INFORMATION REQUESTS - NOT EXEMPTED	AC+1	AC+1		AC=DATE REQUEST IS FULFILLED; INCLUDES WRITTEN REQUESTS FOR PUBLICATIONS (TEXAS GOVT CODE 552.002)
1.1.021	5148	PUBLIC INFORMATION REQUESTS - EXEMPTED (DENIED)	AC+2	AC+2		AC=DATE OF DENIAL OF REQUEST.
1.1.023	1606	ORGANIZATION CHARTS	US	US	A	
1.1.024	1607	PLANS AND PLANNING RECORDS	AC+3	AC+3	R	Vital Record. DATA PROCESSING PLANNING RECORDS ARE NOT ARCHIVAL. AC=DECISION MADE TO IMPLEMENT OR NOT TO IMPLEMENT RESULT OF PLANNING PROCESS
1.1.038	1618	CUSTOMER SURVEYS	AC	AC		AC=FINAL DISPOSITION OF SUMMARY REPORT. (SURVEYS CANNOT BE DESTROYED UNTIL SUMMARY REPORT HAS BEEN SENT TO STATE ARCHIVIST AT THE END OF THE RETENTION PERIOD.) SEE 1.1.067 FOR SUMMARY REPORTS COMPILED FROM CUSTOMER SURVEYS.
1.1.043	1620	TRAINING MATERIALS	US+1	US+1		

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1.1.048	5781	LITIGATION FILES	AC+1	AC+1	R	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 IN A LAWSUIT
1.1.055	77	INFORMATION RESOURCES STRATEGIC PLAN	AC+6	AC+6	A	AC=SEPT 1 OF ODD-NUMBERED CALENDAR YEARS. ARCHIVAL REQUIREMENT MET BY SENDING REQUIRED COPIES OF COMPLETED AGENCY PLAN TO TEXAS STATE DEPOSITORY PROGRAM.
1.1.055	1466	BIENNIAL OPERATING PLAN FILES	AC+6	AC+6	A	AC=SEPT 1 OF ODD-NUMBERED CALENDAR YEARS. ARCHIVAL REQUIREMENT MET BY SENDING REQUIRED COPIES OF COMPLETED AGENCY PLAN TO TEXAS STATE DEPOSITORY PROGRAM.
1.1.055	6731	INFORMATION TECHNOLOGY DETAIL	AC+6	AC+6	A	AC=SEPT 1 OF ODD-NUMBERED CALENDAR YEARS. ARCHIVAL REQUIREMENT MET BY SENDING STRATEGIC PLAN TO TEXAS STATE PUBLICATIONS DEPOSITORY PROGRAM.
1.1.057	904	TRANSITORY INFORMATION	AC	AC		AC=PURPOSE OF RECORD HAS BEEN FULFILLED. INCLUDES CHAT ROOM CORRESPONDENCE, SOME OF WHICH MAY CONTAIN CONFIDENTIAL INFORMATION; AC=PURPOSE OF RECORD HAS BEEN FULFILLED. ALSO 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	901	STAFF MEETING MINUTES AND NOTES	1	1		
1.1.065	1616	REPORTS AND STUDIES (NON-FISCAL) - RAW DATA	AV	AV		

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1.1.066	1614	REPORTS - BIENNIAL OR ANNUAL AGENCY (NARRATIVE)	AC+6	AC+6	A	ARCHIVAL REQUIREMENT MET BY SENDING REPORT TO TEXAS STATE PUBLICATIONS DEPOSITORY PROGRAM.
1.1.067	1613	REPORTS & STUDIES (NON-FISCAL)	3	3	R	IF REPORT HAS HISTORICAL RELEVANCE, DO NOT DESTROY REPORT BUT SEND IT TO THE STATE ARCHIVIST AT THE END OF THE RETENTION PERIOD.
1.1.069	1615	REPORTS - EMPLOYEE	1	1		
1.1.070	1609	AGENCY RULES, POLICIES & PROCEDURES - FINAL	AC+3	AC+3	R	Vital Record. INCLUDES DIVISION ADMINISTRATIVE HANDBOOK & TWICES POLICIES AND PROCEDURES MANUAL. AC=COMPLETION OR TERMINATION OF PROGRAM, RULES, POLICIES OR PROCEDURES.
1.1.071	5736	AGENCY RULES, POLICIES & PROCEDURES - WORKING FILES	AC+3	AC+3	R	Vital Record. AC=COMPLETION OR TERMINATION OF PROGRAM, RULES, POLICIES OR PROCEDURES.
1.3.001	5779	WEB PUBLICATIONS	AC+2	AC+2		AC=UNTIL SUPERSEDED OR OBSOLETE. WEB PUBLICATIONS ARE MADE AVAILABLE ONLINE TO PUBLIC FOR AT LEAST SIX MONTHS. 13 TAC RULE 3.4(B). THEN RETAINED TO MEET THEIR RECORDS SERIES' RETENTION PERIOD OR THE PERIOD FOR PUBLICATIONS, WHICHEVER IS LONGER. REQUIRED NUMBER OF COPIES PRINTED AT HHS PRINTING ARE SENT TO CLEARINGHOUSE. IF OUTSIDE PRINTER, PROGRAM MUST SEND REQUIRED NUMBER OF COPIES TO HHS PRINTING FOR SUBMISSION TO CLEARINGHOUSE.
1.3.002	5776	WEBSITE DEVELOPMENT FILES	AV	AV	R	AV=PUBLICATION ON THE WEBSITE
2.0	2955	E-MAIL SERVER BACK-UP TAPES	AC	AC		AC=USUALLY KEPT FOR AT LEAST SIX WEEKS, BUT NO LONGER THAN ONE YEAR, AND THEN REUSED.

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2.0	5118	FILE SERVER BACK-UP TAPES	AC		AC		AC=6 MONTHS, EXCEPT FOR THE FIRST WEEK OF EACH MONTH, JAN-AUG AND OCT-DEC, WHICH ARE RETAINED 15 MONTHS; THE FIRST WEEK IN SEPTEMBER TAPES ARE RETAINED 5 YEARS. MAY CONTAIN CONFIDENTIAL INFORMATION.	
2.1.001	4976	DATA ENTRY ACCOUNTS AND PROGRAMS/AUTOMATED FILES, PROCESSING FILES, DATA ENTRY DOCUMENTS AND NOTES	AC		AC		Vital Record. AC=COMPLETION OF 3RD VERIFICATION CYCLE, OR AUDIT COMPLETION CONFIRMING SUCCESSFUL TRANSACTION PROCESSING, OR REQUIRED AUDIT TRAIL MAINTENANCE, OR THE ABILITY OT RESTORE OR MIGRATE WHEN ERRORS ARE DETECTED OR WHEN HARDWARE OR SOFTWARE CHANGES OCCUR.	
2.1.002	4951	MASTER FILES - AUTOMATED FILES	AC		AC		Vital Record. AC=COMPLETION OF 3RD VERIFICATION CYCLE, OR AUDIT COMPLETION CONFIRMING SUCCESSFUL TRANSACTION PROCESSING, OR REQUIRED AUDIT TRAIL MAINTENANCE, OR THE ABILITY OT RESTORE OR MIGRATE WHEN ERRORS ARE DETECTED OR WHEN HARDWARE OR SOFTWARE CHANGES OCCUR. FOLLOW RETENTION PERIOD APPROVED FOR THE EQUIVALENT TYPE OF TEXTUAL RECORD	
2.1.007	70	SOFTWARE PROGRAM AND JOB CONTROL LANGUAGE	AC		AC		Vital Record. 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	

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2.1.008	1820	HARDWARE DOCUMENTATION	AC	AC			Vital Record. AC=UNTIL ELECTRONIC RECORDS ARE TRANSFERRED TO AND MADE USABLE IN A NEW HARDWARE OR THERE ARE NO ELECTRONIC RECORDS BEING RETAINED TO MEET AN APPROVED RETENTION PERIOD THAT REQUIRE THE HARDWARE TO BE RETRIEVED AND READ.
2.1.009	4117	TECHNICAL DOCUMENTATION	AC	AC			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.
2.2.001	71	SYSTEM MONITORING RECORDS	AV	AV			
2.2.002	72	COMPUTER UTILIZATION RECORDS	FE+3	FE+3			
2.2.004	75	COMPUTER JOB SCHEDULES AND REPORTS	3 MO	3 MO			WILL BE RETAINED AT LEAST 3 MONTHS.
2.2.011	287	DATA ENTRY BATCH CONTROL RECORDS	AC	AC			AC=WHEN RECONCILIATION CONFIRMED.
2.2.013	6023	QUALITY ASSURANCE RECORDS	AC	AC			AC=NO LONGER NEEDED AS AN AUDIT TRAIL FOR ANY RECORDS MODIFIED.
2.2.016	48	SOFTWARE REGISTRATIONS, WARRANTIES, AND LICENSE AGREEMENTS	LA+3	LA+3			Vital Record.
3.1	4655	IRM PERSONNEL ACTION FORMS	2	2			INFORMATION TECHNOLOGY ONLY FORM.

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3.1	6746	POSITIVE PERFORMANCE RECORDS (MAINTAINED BY SUPERVISORS)	AC	AC	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. BEGINING 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	2950	EMPLOYEE COUNSELING RECORDS	AC+3	AC+3	AC=TERMINATION OF COUNSELING
3.1.014	5025	EMPLOYMENT SELECTIONS - INCLUDES INTERVIEW NOTES & DOCUMENTATION OF SELECTION PROCESS	2	2	Vital Record maintainted by CAPPS only. Send all records to CAPPS. CAPPS HAS FULLY ASSUMED THIS FUNCTIONALITY AS OF SEPT 2006.
3.1.018	1627	GRIEVANCE RECORDS	AC+2	AC+2	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
3.1.023	903	POSITION/JOB DESCRIPTIONS	AC+4	AC+4	Vital Record. AC=UNTIL SUPERSEDED OR JOB ELIMINATED. AccessHR ASSUMED THIS FUNCTIONALITY IN AUGUST 2005.
3.1.027	292	TRAINING PORTFOLIOS AND CERTIFICATES	AC+5	AC+5	AC=TERMINATION OF EMPLOYMENT.
3.1.037	1635	EMPLOYEE RECOGNITION RECORDS	AC+5	AC+5	AC=TERMINATION OF EMPLOYMENT; FORWARD PRINTED COPY TO HHS MANAGER FOR HUMAN RESOURCE RECORDS FOR EMPLOYEE MASTER PERSONNEL FILE.

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3.2	1568	EMPLOYEE DATA INFORMATION	FE+5	FE+5		REF# H216	
3.2	1593	PAYROLL WARRANT LISTS	FE+5	FE+5			
3.3.020	1634	WORK SCHEDULES & ASSIGNMENTS	1	1			
3.3.025	1591	IT ADMINISTRATIVE HANDBOOK	US+3	US+3			
3.4	1564	TIME ACCOUNTING	FE+3	FE+3		Dovico Reporting System for Application Development Staff.	
3.4	1569	EMPLOYEE LEAVE INFORMATION	FE+3	FE+3		REF# H229	
4.5.006	1562	ANNUAL OPERATING BUDGETS	FE+3	FE+3		REF# H213	
5.1.001	1567	GRANTS CONTRACT DATA	AC+7	AC+7		Vital Record. REF# H206 AC=EXPIRATION OR TERMINATION OF THE INSTRUMENT ACCORDING TO ITS TERMS.	
5.2.004	66	SPACE MANAGEMENT REQUESTS	1	1			
5.2.008	74	COMPUTER HARDWARE MAINTENANCE RECORDS	LA+3	LA+3			
5.2.009	1587	INVENTORY TRANSFERS	FE+3	FE+3		CONVENIENCE COPY	
5.2.010	5092	EQUIPMENT MANUALS	LA	LA			
5.3	3674	PROCUREMENT CARD PURCHASES SUPPORTING DOCUMENTATION	FE+3	FE+3			

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5.3.007	4213	BID DOCUMENTATION	FE+3	FE+3			INCLUDES BID REQUISITION, INVITATIONS TO BID, RFPs, BID SPECIFICATIONS, ACCEPTED AND REJECTED BIDS, BID TABULATIONS/EVALUATIONS.	
5.3.008	1639	BUDGET/PURCHASING RECORDS/LOGS	FE+3	FE+3				
5.4.012	81	SECURITY CLEARANCES	AC+2	AC+2			Vital Record. (INCLUDES PASSWORDS & SIGNED STATEMENTS OR SIMILAR INSTRUMENTS OF ACCESS TO AGENCY FACILITIES, EQUIPMENT, OR AUTOMATED SYSTEMS) AC=UNTIL SUPERSEDED, DATE OF EXPIRATION, OR DATE OF TERMINATION, WHICHEVER SOONER.	
5.4.013	68	DISASTER PREPAREDNESS AND RECOVERY PLAN	US	US			Vital Record.	
5.5.004	1858	SYSTEM ACTIVITY REPORTS	AV	AV				

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