### State of Texas
Records Retention Schedule

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

Automated Facsimile of SLR-105

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

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

<table>
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<tr>
<th>Item #</th>
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<th>Agency</th>
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#### 830 - INFORMATION TECHNOLOGY SECTION

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<th>Agency</th>
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- **4575**  
  INTRANET PUBLICATIONS  
  AV  
  AV

- **5**  
  LOG FILE REPORTS  
  AV  
  AV

- **1809**  
  INTERNET APPLICATION FORMS  
  US  
  US

- **2095**  
  PEOPLESOFT FILES/RECORDS  
  4  
  4  
  A  
  Vital Record.

- **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.

- **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.

- **899**  
  GENERAL CORRESPONDENCE (LIMITED TO DOCUMENTING THE ROUTINE OPERATIONS OF THE POLICIES, PROGRAMS, SERVICES OR PROJECTS.)  
  2  
  2  
  INCLUDES SOME E-MAIL.

- **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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**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US - Until Superseded  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  
LA - Life of Asset  
PM - Permanent  
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**

**Automated Facsimile of SLR-105**  
**Agency:** Texas Department of State Health Services

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<td>1.1.021 5148</td>
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<td>1.1.024 1607</td>
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<td>PLANS AND PLANNING RECORDS</td>
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<td>1.1.038 1618</td>
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<td>CUSTOMER SURVEYS</td>
<td>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.</td>
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<td>1.1.043 1620</td>
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<td>TRAINING MATERIALS</td>
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**INFORMATION TECHNOLOGY SECTION**

**830**

**RECORDS RETENTION SCHEDULE (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
- **LA** - Life of Asset
- **PM** - Permanent
- **MO** - Months
- **DA** - Days

**ARCHIVAL CODES (Field 8)**

- **R** - Review by State Archivist
- **A** - Transfer to State Archivist
- **E** - Exempt from sending

**VITAL Record (Include in Field 9)**

- **AV** - As Long As Administratively Valuable
- **US** - Until Superseded
- **DA** - Days
# Records Retention Schedule

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

**Page 3**

**Recertified: 5/23/2012**  
**Updated (with or without amendment): 10/4/2017**

Automated Facsimile of SLR-105  
**Agency Code: 537**  
**Agency: Texas Department of State Health Services**

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<td>LITIGATION FILES</td>
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<td>1.1.055</td>
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<td>INFORMATION RESOURCES STRATEGIC PLAN</td>
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<td>AC+6</td>
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<td>AC=SEPT 1 OF ODD-NUMBERED CALENDAR YEARS. ARCHIVAL REQUIREMENT MET BY SENDING REQUIRED COPIES OF COMPLETED AGENCY PLAN TO TEXAS STATE DEPOSITORY PROGRAM.</td>
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<td>TRANSITORY INFORMATION</td>
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<td>AC=PREMISE OF RECORD HAS BEEN FULLFILLED. INCLUDES CHAT ROOM CORRESPONDENCE, SOME OF WHICH MAY CONTAIN CONFIDENTIAL INFORMATION; AC=PURPOSE OF RECORD HAS BEEN FULLFILLED, ALSO INCLUDES TELEPHONE MESSAGE NOTIFICATIONS &amp; SOME E-MAIL CONTAINING ROUTINE INFORMATION USED FOR COMMUNICATION, NOT FOR THE DOCUMENTATION OF A SPECIFIC AGENCY TRANSACTION.</td>
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**INFORMATION TECHNOLOGY SECTION**

**RETENTION CODES (Field 7)**

- AC - After Closed, Terminated, Completed, Expired, Settled  
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**ARCHIVAL CODES (Field 8)**

- A - Transfer to State Archivist  
- R - Review by State Archivist  
- E - Exempt from sending

**VITAL Record (Include in Field 9)**

- X - Recertification
### State of Texas
Records Retention Schedule

**Recertified: 5/23/2012**  
**Amendment Approved: 2/19/2014**  
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2. Agency Code: 537  
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<td>REPORTS - BIENNIAL OR ANNUAL AGENCY (NARRATIVE)</td>
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<td>IF REPORT HAS HISTORICAL RELEVANCE. DO NOT DESTROY REPORT BUT SEND IT TO THE STATE ARCHIVIST AT THE END OF THE RETENTION PERIOD.</td>
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<td>AGENCY RULES, POLICIES &amp; PROCEDURES - FINAL</td>
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<td>VITAL Record. INCLUDES DIVISION ADMINISTRATIVE HANDBOOK &amp; TWICES POLICIES AND PROCEDURES MANUAL. AC=COMPLETION OR TERMINATION OF PROGRAM, RULES, POLICIES OR PROCEDURES.</td>
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<td>AGENCY RULES, POLICIES &amp; PROCEDURES - WORKING FILES</td>
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<td>VITAL Record. AC=COMPLETION OR TERMINATION OF PROGRAM, RULES, POLICIES OR PROCEDURES.</td>
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<td>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, WHICHER EVER 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.</td>
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<td>AC=USUALLY KEPT FOR AT LEAST SIX WEEKS, BUT NO LONGER THAN ONE YEAR, AND THEN REUSED.</td>
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</table>

#### RETENTION CODES (Field 7)
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#### ARCHIVAL CODES (Field 8)
- R = Review by State Archivist
- E = Exempt from sending
- A = Transfer to State Archivist

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

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

Automated Facsimile of SLR-105

**Records Series Item #**  **Agency**  **Item #**  **Records Series Title**  **Retention Period**  **Archival**  **Remarks**  **10. 106 No.**

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<td>2.0 5118 830 - INFORMATION TECHNOLOGY SECTION</td>
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<td>WILL BE RETAINED AT LEAST 3 MONTHS.</td>
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**830 - INFORMATION TECHNOLOGY SECTION**

**RECORDS CODES (Field 7)**  
AC - After Closed, Terminated, Completed, Expired, Settled  
AV - As Long As Administratively Valuable  
CE - Calendar Year End  
DA - Days  
DE - Days End  
FE - Fiscal Year End  
LA - Life of Asset  
PM - Permanent  
PM - Permanent  
US - Until Superseded  
US - Until Superseded

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

**VITAL RECORD (Include in Field 9)**  
E - Exempt from sending
### Records Retention Schedule

State of Texas

**INFORMATION TECHNOLOGY SECTION**

<table>
<thead>
<tr>
<th>Records Series Item #</th>
<th>Agency</th>
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<th>Total</th>
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<th>3. Agency: Texas Department of State Health Services</th>
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<tr>
<td><strong>3.1</strong> 6746 POSITIVE PERFORMANCE RECORDS (MAINTAINED BY SUPERVISORS)</td>
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<td><strong>3.1.006</strong> 2950 EMPLOYEE COUNSELING RECORDS</td>
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<td><strong>3.1.014</strong> 5025 EMPLOYMENT SELECTIONS - INCLUDES INTERVIEW NOTES &amp; DOCUMENTATION OF SELECTION PROCESS</td>
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<td><strong>3.1.018</strong> 1627 GRIEVANCE RECORDS</td>
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<td><strong>3.1.023</strong> 903 POSITION/JOB DESCRIPTIONS</td>
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<td><strong>3.1.027</strong> 292 TRAINING PORTFOLIOS AND CERTIFICATES</td>
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**RETENTION CODES (Field 7)**

- **AC**: After Closed, Terminated, Completed, Expired, Settled
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- **MO**: Months
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**ARCHIVAL CODES (Field 8)**

- **R**: Transfer to State Archivist
- **A**: Review by State Archivist
- **E**: Exempt from sending

**VITAL Record (Include in Field 9)**

- **AV**: As Long As Administratively Valuable
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**Records Retention Schedule**

*State of Texas*

**INFORMATION TECHNOLOGY SECTION**

10/4/2017

Recertified: 5/23/2012  Updated (with or without amendment): 10/4/2017

Amendment Approved: 2/19/2014

Agency: Texas Department of State Health Services

Automated Facsimile of SLR-105

**Agency Code:** 537

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**VITAL Record (Include in Field 9):**

- Vital Record. REF# H206 AC=EXPIRATION OR TERMINATION OF THE INSTRUMENT ACCORDING TO ITS TERMS.
### Records Retention Schedule

**State of Texas**

**Records Retention Schedule**

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**INFORMATION TECHNOLOGY SECTION**

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<th>5.3.007</th>
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<th>BID DOCUMENTATION</th>
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<th>FE+3</th>
<th>INCLUDES BID REQUISITION, INVITATIONS TO BID, RFPs, BID SPECIFICATIONS, ACCEPTED AND REJECTED BIDS, BID TABULATIONS/EVALUATIONS.</th>
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<tr>
<td>5.4.012</td>
<td>81</td>
<td>SECURITY CLEARANCES</td>
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<td>AC+2</td>
<td>Vital Record. (INCLUDES PASSWORDS &amp; 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.</td>
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<td>DISASTER PREPAREDNESS AND RECOVERY PLAN</td>
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- VITAL Record