### State of Texas
#### Records Retention Schedule

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

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

<table>
<thead>
<tr>
<th>Records Series Item #</th>
<th>Agency</th>
<th>Storage</th>
<th>Total</th>
<th>Retention Period</th>
<th>Archival</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1 6864</td>
<td>PROGRAM CORRESPONDENCE</td>
<td>AC+3</td>
<td>AC+3</td>
<td>AC= MARCH 1 OF FOLLOWING FEDERAL FISCAL YEAR INCLUDING DATE OF FINAL STATEWIDE IMPLEMENTATION OF PROJECT. FEDERAL FISCAL YEAR STARTS OCTOBER 1. RETENTION PERIOD REQUIRED BY USDA FEDERAL REGULATION 7 CFR PART 246.25.</td>
<td></td>
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</tr>
<tr>
<td>1.1 6871</td>
<td>PLANS AND PLANNING RECORDS</td>
<td>AC+3</td>
<td>AC+3</td>
<td>E DATA PROCESSING PLANNING RECORDS ARE NOT ARCHIVAL. AC=MARCH 1 OF FOLLOWING FEDERAL FISCAL YEAR IN WHICH DECISION MADE TO IMPLEMENT OR NOT TO IMPLEMENT RESULT OF PLANNING PROCESS. FEDERAL FISCAL YEAR STARTS OCTOBER 1. RETENTION REQUIRED BY USDA FEDERAL REGULATION 7 CFR PART 246.25.</td>
<td></td>
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</tr>
<tr>
<td>1.1.007 6865</td>
<td>PROGRAM ADMINISTRATIVE CORRESPONDENCE</td>
<td>AC+3</td>
<td>AC+3</td>
<td>R Vital Record. AC=DATE OF FINAL STATEWIDE IMPLEMENTATION OF PROJECT + MARCH 1 OF FOLLOWING FEDERAL FISCAL YEAR. FEDERAL FISCAL YEAR STARTS OCTOBER 1. RETENTION PERIOD REQUIRED BY USDA FEDERAL REGULATION 7 CFR PART 246.25. ONLY ADMINISTRATIVE CORRESPONDENCE OF EXECUTIVE STAFF, BOARD OR COMMISSION MEMBERS, DIVISION DIRECTORS AND SECTION/UNIT/BRANCH HEADS REQUIRE ARCHIVAL REVIEW.</td>
<td></td>
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<tr>
<td>1.1.007 6866</td>
<td>DEPARTMENT ADMINISTRATIVE CORRESPONDENCE</td>
<td>4</td>
<td>4</td>
<td>R Vital Record. NON-USDA RELATED CORRESPONDENCE. ONLY ADMINISTRATIVE CORRESPONDENCE OF EXECUTIVE STAFF, BOARD OR COMMISSION MEMBERS, DIVISION DIRECTORS AND SECTION/UNIT/BRANCH HEADS REQUIRE ARCHIVAL REVIEW.</td>
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</tbody>
</table>

**RETENTION 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
- MO - Months
- PM - Permanent

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

**VITAL Record (Include in Field 9)**
- V - Vital Record

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403C - NUTRITION SVS - PROGRAM DEVELOPMENT & PROCESS IMPROVEMENT BRANCH (PDPI)
<table>
<thead>
<tr>
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<td>1.1.008 6867</td>
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<tr>
<td>DEPARTMENT GENERAL CORRESPONDENCE (LIMITED TO DOCUMENTING THE ROUTINE OPERATIONS OF THE POLICIES, PROGRAMS, SERVICES OR PROJECTS.)</td>
<td>2</td>
<td>2</td>
<td>NON-USDA RELATED CORRESPONDENCE. INCLUDES SOME E-MAIL.</td>
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<tr>
<td>1.1.013 6868</td>
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<tr>
<td>CALENDARS, APPOINTMENT AND ITINERARY RECORDS</td>
<td>CE+1</td>
<td>CE+1</td>
<td>R</td>
<td>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.</td>
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<td>1.1.020 6869</td>
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<tr>
<td>PUBLIC INFORMATION REQUESTS - NOT EXEMPTED (OPEN RECORDS REQUEST-FILLED)</td>
<td>AC+1</td>
<td>AC+1</td>
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<td>AC=DATE REQUEST FILLED</td>
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<tr>
<td>1.1.021 6870</td>
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<tr>
<td>PUBLIC INFORMATION REQUESTS - EXEMPTED (OPEN RECORDS REQUESTS-DENIED)</td>
<td>AC+2</td>
<td>AC+2</td>
<td></td>
<td>AC=DATE OF NOTIFICATION THAT RECORDS ARE EXEMPT.</td>
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<tr>
<td>1.1.057 6872</td>
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<tr>
<td>TRANSITORY INFORMATION</td>
<td>AC</td>
<td>AC</td>
<td></td>
<td>AC= PURPOSE OF RECORD HAS BEEN FULFILLED. INCLUDES TELEPHONE MESSAGE NOTIFICATIONS &amp; SOME E-MAIL CONTAINING ROUTINE INFORMATION USED FOR COMMUNICATION, BUT NOT FOR THE DOCUMENTATION OF A SPECIFIC AGENCY TRANSACTION.</td>
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<tr>
<td>1.1.063 6873</td>
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<tr>
<td>STAFF MEETING MINUTES AND NOTES</td>
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<td>2.1 2091</td>
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<tr>
<td>AUTOMATION RECORDS (TEXASWIN)</td>
<td>AC+3</td>
<td>AC+3</td>
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<td>DATABASE IS UPDATED CONTINUOUSLY ON A DAILY BASIS. AC=MARCH 1 OF FOLLOWING FEDERAL FISCAL YEAR. FEDERAL FISCAL YEAR STARTS OCTOBER 1. RETENTION PERIOD REQUIRED BY USDA FEDERAL REGULATION 7 CFR PART 246.25.</td>
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</tbody>
</table>

**State of Texas**  
Records Retention Schedule  
**403C - NUTRITION SVS - PROGRAM DEVELOPMENT & PROCESS IMPROVEMENT BRANCH (PDPI)**

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

**Archival Codes (Field 8)**  
A - Transfer to State Archivist  
R - Review by State Archivist  
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**VITAL Record (Include in Field 9)**
<table>
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<tr>
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<td>2.1.009</td>
<td>6874</td>
<td>TECHNICAL DOCUMENTATION</td>
<td>AC</td>
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<td>2.2.016</td>
<td>5980</td>
<td>SOFTWARE REGISTRATIONS, WARRANTIES, AND LICENSE AGREEMENTS</td>
<td>LA+3</td>
<td>LA+3</td>
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<td>3.1</td>
<td>6875</td>
<td>POSITIVE PERFORMANCE RECORDS (MAINTAINED BY SUPERVISORS)</td>
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<td>3.1.006</td>
<td>6876</td>
<td>EMPLOYEE COUNSELING NOTES</td>
<td>AC+3</td>
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<td>3.1.014</td>
<td>6877</td>
<td>EMPLOYMENT SELECTION RECORDS / NOTES (INCLUDES APPLICATIONS FOR EMPLOYMENT-NOT HIRED)</td>
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<td>3.3.023</td>
<td>6879</td>
<td>REIMBURSABLE ACTIVITIES, REQUESTS &amp; AUTHORIZATIONS (TRAVEL, TUITION REIMBURSEMENT, WORKSHOPS)</td>
<td>FE+3</td>
<td>FE+3</td>
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**RECORDS SERIES TITLE**

403C - NUTRITION SVS - PROGRAM DEVELOPMENT & PROCESS IMPROVEMENT BRANCH (PDPI)

**STATE OF TEXAS**

**RECORDS RETENTION SCHEDULE**

**REFRESHED: 5/23/2012**
**AMENDMENT APPROVED: 2/19/2014**
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**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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<tbody>
<tr>
<td>3.3.030</td>
<td>6880</td>
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<td>US+2</td>
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<td>(MATERIALS AND RECORDS FOR INHOUSE TRAINING OF AGENCY PERSONNEL OF POLICIES AND PROCEDURES.) TRAINING MATERIAL NOT FOUND IN TRAIN OR CAPPS. (DOES NOT INCLUDE HAZARDOUS MATERIAL TRAINING RECORDS).</td>
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<td>4.7.008</td>
<td>6881</td>
<td>FEDERAL GRANT RECORDS</td>
<td>AC+3</td>
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<td>Vital Record. AC=SATISFACTION OF ALL UNIFORM ADMINISTRATIVE REQUIREMENTS FOR GRANTS AND COOPERATIVE AGREEMENTS TO STATE AND LOCAL GOVERNMENTS (THE COMMON RULE) AND MARCH 1 OF FOLLOWING FEDERAL FISCAL YEAR. FEDERAL FISCAL YEAR STARTS OCTOBER 1. RETENTION REQUIRED BY USDA FEDERAL REGULATION 7 CFR PART 246.25.</td>
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<td>5.1.001</td>
<td>6882</td>
<td>CONTRACTS</td>
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<td>Vital Record. AC=EXPIRATION OR TERMINATION OF THE INSTRUMENT ACCORDING TO ITS TERMS</td>
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**ARCHIVAL CODES (Field 8)**  
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