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

<table>
<thead>
<tr>
<th>Agency Code</th>
<th>Total</th>
<th>Records Series Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>537</td>
<td></td>
<td>TEXAS PRIMARY CARE OFFICE</td>
</tr>
</tbody>
</table>

| 1.1.008 | 7253 | APPLICATIONS OF NON-RESIDENT PHYSICIANS TO REMAIN IN U.S. (TEXAS CONRAD 30) | 4 | 4 |
| 1.1.013 | 7254 | CALENDARS / APPOINTMENT BOOKS/ 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. |
| 1.1.020 | 7255 | PUBLIC INFORMATION REQUESTS - NOT EXEMPTED | AC+1 | AC+1 |
| 1.1.021 | 7256 | PUBLIC INFORMATION REQUESTS - EXEMPTED (DENIED) | AC+2 | AC+2 |
| 1.1.024 | 183  | PLANS AND PLANNING RECORDS | AC+3 | AC+3 | R | AC=DECISION MADE TO IMPLEMENT OR NOT TO IMPLEMENT RESULT OF PLANNING PROCESS |
| 1.1.040 | 2062 | REPORTS AND PAPERS & SPEECHES- CONFERENCE | AC | AC | R | AC=END OF TERM IN OFFICE OR TERMINATION OF SERVICE IN A STATE POSITION. |
| 1.1.043 | 3964 | TRAINING MATERIALS/MANUALS | US+1 | US+1 |

#### RETENTION CODES (Field 7)
- AC - After Closed, Terminated, Completed, Expired, Settled
- AV - As Long As Administratively Valuable
- US - Until Superseded
- CE - Calendar Year End
- CE+1 - Calendar Year End
- CE+2 - Calendar Year End
- CE+3 - Calendar Year End
- MO - Months
- PM - Permanent
- LA - Life of Asset
- DA - Days

#### ARCHIVAL CODES (Field 8)
- R - Review by StateArchivist
- 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- US - Until Superseded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
- LA - Life of Asset
- PM - Permanent
## State of Texas
### Records Retention Schedule

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

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

<table>
<thead>
<tr>
<th>Series Item #</th>
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<th>Records Series Title</th>
<th>Retention Period</th>
<th>Archival</th>
<th>Remarks</th>
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<td>11057</td>
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<td>11058</td>
<td>2039</td>
<td>Meeting Agendas and Minutes</td>
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<td>11063</td>
<td>4038</td>
<td>Meeting Minutes/Notes - Staff</td>
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<td>11065</td>
<td>1001</td>
<td>Reports, Studies, and Surveys - Raw Data (non-fiscal)</td>
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<td>11070</td>
<td>2101</td>
<td>Rules, Policies &amp; Procedures, Instruction Manuals - Final</td>
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<td>4200</td>
<td>Rules, Policies and Procedures - Working Files</td>
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**RETOINT 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)**
- **R** - Review by State Archivist
- **A** - Transfer to State Archivist
- **E** - Exempt from sending

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

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**894 - Texas Primary Care Office**
### 3.1.006
3.1.006 2116 EMPLOYEE COUNSELING NOTES AC+3 AC+3 AC=TERMINATION OF COUNSELING. KEEP THIS RECORD SEPARATE FROM PERFORMANCE APPRAISAL.

### 3.3.020
3.3.020 4045 WORK SCHEDULES/ASSIGNMENTS 1 1

### 4.7
4.7 917 TEXAS PRIMARY CARE OFFICE GRANTS AC+3 AC+3 AC=END OF THE GRANT OR GRANT RENEWAL. THESE ARE STATE GRANTS; NOT FEDERAL GRANTS. INCLUDES APPLICATION, PROGRESS NOTES & REPORTS, DELIVERABLES AND VOUCHERS FOR FQHC INCUBATOR GRANT AND OTHER GRANTS.

### 4.7.008
4.7.008 6226 FEDERAL GRANT RECORDS AC+3 AC+3 Vital Record. AC=SATISFACTION OF ALL UNIFORM ADMINISTRATIVE REQUIREMENTS FOR GRANTS AND COOPERATIVE AGREEMENTS TO STATE AND LOCAL GOVERNMENTS (THE COMMON RULE).

### 5.1.004
5.1.004 892 ADDRESS AND TELEPHONE LISTING US US

### 5.1.007
5.1.007 1768 REQUISITION FOR IN-AGENCY /INTER-AGENCY COPY/PRINTING SERVICE AV AV