

APPROVED 11/2/2006

State of Texas
Records Retention Schedule

Automated Facsimile of SLR-105

2. AGENCY CODE: 537

3. AGENCY: TEXAS DEPARTMENT OF STATE HEALTH SERVICES

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4. Records

7. RETENTION PERIOD

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108 - CENTER FOR HEALTH STATISTICS

	2727	MEDICAID LINKING DATA	AV		AV		INFORMATION EXTRACTED FROM HHSC RECORDS	
	2766	SLIAG PROGRAM FILES (INCLUDES U-B AND HCFA-1500 FORMS)	AV	10	AV+10		RETAIN 10 YEARS AS PER GOVERNOR'S OFFICE INSTRUCTIONS/FEDERAL LAW.	05-537-195
	6751	DATA USE AGREEMENT, PUBLIC USE DATA FILE	FE+5		FE+5			
	6752	DATA USE AGREEMENT, RESEARCH FILE	AC+1		AC+1			
	6797	BRFSS DATA (INCLUDING STATISTICAL FILES AND PUBLIC USE DATA FILES)	AV		AV			
	6799	HEALTH SURVEYS USER GROUP (HSUG) - MEETING NOTES, ATTENDENCE SHEETS	CE+3		CE+3			
	6800	BRFSS REQUEST DATA FILES AND OUTPUT	AC+3		AC+3			
	6802	SPECIAL TELEPHONE SURVEYS' DATA AND QUESTIONAIRES (INCLUDES STEPS SURVEYS, DIABETES SURVEYS, ASTHMA CALL-BACK SURVEYS, ETC)	AV		AV			
	6803	BRFSS SERVICE LEVEL AGREEMENTS	AC+3		AC+3			
	6804	INFORMAL OR WORKGROUP MEETINGS	AV		AV		AGENDAS, DOCUMENTATION, MEETING MATERIALS, MEETING NOTES	
1.1	1251	TEXAS VITAL STATISTICS ANNUAL REPORTS (BIRTH, DEATH, MARRIAGE, AND DIVORCE) (ALL YEARS)	PM		PM	A	RETENTION PERIOD REQUIRED TO FULFILL ONGOING REQUESTS FOR STATISTICS.	
1.1	1268	DATA REQUEST/DATA DISSEMINATION TRACKING SYSTEM	FE+3		FE+3			
1.1	2759	HOSPITAL DATABASE	AV		AV		HOSPITAL PRIMARY CONTACT FILES	
1.1	2762	HOSPITAL INPATIENT DISCHARGE DATA	AV		AV			

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ARCHIVAL CODES (Field 8)

VITAL Record (Include in Field 9)

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1.1	2797	HEDIS DATA AND REPORTS	AV		AV		
1.1	2801	HDD COMPLIANCE RECORDS	AV		AV		
1.1	6798	BRFSS BLANK QUESTIONAIRES (FOR REFERENCE)	AV		AV		
1.1.007	2733	ADMINISTRATIVE CORRESPONDENCE (INCLUDES HOSP DATA ADV COMM, STATEWIDE HEALTH COORD COUNCIL, STATE HEALTH PLAN, STRATEGIC PLAN, HLTH PROF RESOURCE CTR, HOSP SURVEYS, HLTH INFO RESEARCH TEAM, TX CTR FOR NURSING WORKFORCE STUDIES)	3		3	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	2736	CORRESPONDENCE, GENERAL	1		1		INCLUDES SOME E-MAIL.
1.1.010	4035	DIRECTIVES (INCLUDES OPP COMPUTER USAGE HANDBOOK, OPP PROCEDURES MANUAL)	US+1		US+1		
1.1.013	4037	CALENDARS/APPOINTMENT BOOKS	CE+1		CE+1	R	INCLUDES CALENDARS IN OUTLOOK. 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	387	LEGAL OPINIONS AND ADVICE	AV		AV	R	
1.1.020	2709	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	2728	PUBLIC INFORMATION REQUESTS - EXEMPTED (DENIED)	AC+2		AC+2		AC=DATE OF DENIAL OF REQUEST
1.1.024	2768	PLANNING RECORDS-METHODOLOGY, DEVELOPMENT SCHEDULES, DEVELOPMENT FILES (INCLUDES STATE HEALTH PLAN AND STRATEGIC PLAN)	AC+3		AC+3	R	AC=DECISION MADE TO IMPLEMENT OR NOT TO IMPLEMENT RESULT OF PLANNING PROCESS

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4. Records Series Item #		5. Agency Item #	6. Records Series Title		7. RETENTION PERIOD			8. Archival	9. Remarks	10. 106 No.
Series Item #	Item #		Agency	Storage	Total					
108 - CENTER FOR HEALTH STATISTICS										
1.1.038	4585	CUSTOMER SURVEYS	AC+3		AC+3				(INCLUDES LEGISLATIVELY MANDATED AGENCY CUSTOMER SERVICE SURVEY); SEE ITEM NUMBER 1.1.067 FOR SUMMARY REPORTS COMPILED FROM CUSTOMER SURVEYS.	
1.1.040	4017	SPEECHES & PAPERS	AC		AC		R		AC=END OF TERM IN OFFICE OR TERMINATION OF SERVICE IN A STATE POSITION.	
1.1.043	439	TRAINING MATERIALS	US+1		US+1					
1.1.057	1269	TRANSITORY INFORMATION	AC		AC				AC=PURPOSE OF RECORD HAS BEEN FULFILLED.	
1.1.058	2735	MEETING AGENDAS (INCLUDES HOSP DATA ADV COMM, STATEWIDE HEALTH COORDINATING COUNCIL, INSTITUTIONAL REVIEW BOARD, HLTH PROF RESOURCE CTR, TEXAS HEALTH CARE INFORMATION COUNCIL; TX CTR FOR NURSING WORKFORCE STUDIES)	PM		PM		A		SEND AGENDAS TO THE OFFICE OF THE STATE ARCHIVIST WITH COPIES OF THE APPROVED MINUTES. (SEE AGENCY ITEM #2800)	
1.1.058	2800	MEETING MINUTES (INCLUDES HOSP DATA ADV COMM, STATEWIDE HEALTH COORD COUNCIL, INSTITUTIONAL REVIEW BOARD, HLTH PROF RESOURCE CTR; TEXAS HEALTH INFORMATION COUNCIL; TX CTR FOR NURSING WORKFORCE STUDIES)	PM		PM		A		SEND COPIES OF THE MINUTES TO THE STATE ARCHIVIST WHEN OFFICIALLY APPROVED.	
1.1.060	2761	AUDIO OR VIDEOTAPES OF OPEN MEETINGS (INCLUDES HOSP DATA ADV COMM, STATEWIDE HEALTH COORD COUNCIL, INSTITUTIONAL REVIEW BOARD, HLTH PROF RESOURCE CTR; TX CTR FOR NURSING WORKFORCE STUDIES.)	AC+90 DA		AC+90 DA				AUDIO TAPES	
1.1.061	2857	MEETING NOTES (INCLUDES HOSP DATA ADV COMM, STATEWIDE HEALTH COORD COUNCIL, HLTH PROF RESOURCE CTR, TEXAS HEALTH CARE INFORMATION COUNCIL)	AC+90 DA		AC+90 DA					
1.1.062	2010	INSTITUTIONAL REVIEW BOARD MEETINGS - SUPPORTING DOCUMENTATION	AC+3		AC+3		A		RETENTION IS BASED ON INSTITUTIONAL REVIEW BOARD RULES.	

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1.1.062	2858	MEETINGS - SUPPORTING DOCUMENTATION (INCLUDES HOSP DATA ADV COMM, STATEWIDE HEALTH COORD COUNCIL, TEXAS HEALTH CARE INFORMATION COUNCIL; TX CTR FOR NURSING WORKFORCE STUDIES)	2		2		A	
1.1.064	2781	AGENCY PERFORMANCE MEASURES DOCUMENTATION (INCLUDES DISSEMINATION TRACKING FORM)	FE+3		FE+3		Vital Record. DOCUMENTATION OF OUTPUT, OUTCOME, EFFICIENCY AND EXPLANATORY MEASURES IN AGENCY'S APPROPRIATIONS REQUEST OR STRATEGIC PLAN & PERFORMANCE MEASURES TO MANAGE AGENCY.	
1.1.065	2706	SURVEYS (INCLUDES ANNUAL SURVEY OF HOSPITALS, ANNUAL STATEMENT OF COMMUNITY BENEFIT STANDARDS)	5	10	15		R	MUST BE RETAINED AS LONG AS ADMINISTRATIVELY VALUABLE, WHICH HISTORICALLY HAS BEEN 15 YEARS. INQUIRIES ABOUT THE SURVEYS ARE RECEIVED ROUTINELY DURING THIS RETENTION PERIOD FROM CUSTOMERS, LEGISLATORS, CITIZENS, AND WE MUST HAVE THE INFORMATION AVAILABLE TO ANSWER THEM.
1.1.065	2860	REPORTS AND STUDIES (NON-FISCAL) - RAW DATA (INCLUDES TX POPULATION & ESTIMATE PROJECTIONS, HOSP DATA PRODUCTS & REPORTS, HPRC REPORTS; TX CTR FOR NURSING WORKFORCE STUDIES)	AV		AV			
1.1.067	2862	REPORTS AND STUDIES - NON-FISCAL (INCLUDES SHCC, LEGISLATIVELY MANDATED REPORTS)	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	4043	REPORTS, EMPLOYEE (ACTIVITY AND PRODUCTION REPORTS USED FOR WORK-LOAD MEASURES, TIME STUDIES)	1		1			
1.1.070	410	AGENCY RULES, POLICIES, AND PROCEDURES- FINAL	AC+3		AC+3		R	Vital Record. AC=COMPLETION OR TERMINATION OF PROGRAM, RULES, POLICIES OR PROCEDURES.
1.1.070	2059	ORIENTATION MANUAL (SHCC; TCNWS)	AC+3		AC+3		R	Vital Record. AC=COMPLETION OR TERMINATION OF PROGRAM, RULES, POLICIES OR PROCEDURES.

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1.1.071	5143	RULES, POLICIES AND PROCEDURES-WORKING FILES	AC+3		AC+3	R	Vital Record. AC=COMPLETION OR TERMINATION OF PROGRAM, RULES, POLICIES OR PROCEDURES.		
1.2.006	2865	RECORDS TRANSMITTAL FORMS	AC+2		AC+2		AC=APPROVAL FOR DESTRUCTION HAS BEEN GIVEN		
1.3.001	2772	PUBLICATIONS (INCLUDES STATE HEALTH PLAN, SELECTED FACTS FOR TEXAS COUNTIES, SELECTED HEALTH PROFESSIONS, MIGRATION FOR BIRTH, RANKINGS FOR TX COUNTIES; VITAL STATISTICS ANNUAL REPORT.)	AC+2		AC+2		AC=UNTIL SUPERCEDED OR OBSOLETE. FOR NEW PUBLICATIONS, HHS PRINTING SENDS COPIES TO STATE PUBLICATIONS CLEARINGHOUSE/DSHSLIBRARY FOR THOSE PRINTED AT HHS PRINTING. FOR PUBLICATIONS PRINTED ELSEWHERE, COPIES ARE SENT TO HHS PRINTING FOR DISTRIBUTION TO CLEARINGHOUSE/LIBRARY.		
1.3.002	4042	PUBLICATION FILES - BACKGROUND MATERIALS, DRAFT COPIES, ORIGINAL ART- WORK (INCLUDES STATE HEALTH PLAN, SELECTED FACTS FOR TEXAS COUNTIES, SELECTED HEALTH PROFESSIONS, MIGRATION FOR BIRTH, RANKINGS FOR TX COUNTIES)	AV		AV	R	Vital Record. INCLUDES PHOTOS		
3.1	6681	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. BEGINNING AUGUST 2005 SUPERVISORS USE Employee Development Notes IN AccessHR TO DOCUMENT SECOND AND THIRD LEVEL REMINDERS, BUT A PAPER COPY IS STILL FORWARDED TO HHSC HR FOR EMPLOYEE'S MASTER PERSONNEL FILE.		
3.1.001	2749	APPLICATION FOR EMPLOYMENT - NOT HIRED	2		2		CONTAINS SOME CONFIDENTIAL INFORMATION. AccessHR ASSUMED THIS FUNCTIONALITY IN MAY 2005.		
3.1.006	2868	EMPLOYEE COUNSELING RECORDS	AC+3		AC+3		AC=TERMINATION OF COUNSELING		
3.1.014	5835	EMPLOYMENT SELECTION RECORDS	2		2		Vital Record. MAY CONTAIN CONFIDENTIAL DATA. AccessHR PARTIALLY ASSUMED THIS FUNCTIONALITY IN MAY 2005.		

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108 - CENTER FOR HEALTH STATISTICS					
3.1.018	5488	GRIEVANCE RECORDS	AC+2	AC+2	Vital Record. MAY CONTAIN CONFIDENTIAL DATA; AC=FINAL DECISION ON GRIEVANCE.
3.1.019	5836	PEFORMANCE APPRAISALS/JOURNALS	2	2	MAY CONTAIN SOME CONFIDENTIAL INFORMATION SUCH AS MEDICAL INFORMATION, SOCIAL SECURITY NUMBER, OR OTHER DATA PROTECTED BY THE PRIVACY DOCTRINE. AccessHR ASSUMED THIS FUNCTIONALITY IN AUGUST 2005.
3.1.020	1270	PERSONNEL CORRECTIVE ACTION DOCUMENTATION/PERFORMANCE ADVISEMENT FORMS	AC+5	AC+5	MAY CONTAIN SOME CONFIDENTIAL INFORMATION. AC=TERMINATION OF CORRECTIVE ACTION
3.1.021	2870	PERSONNEL DISCIPLINARY ACTION DOCUMENTATION	AC+5	AC+5	Vital Record. AC=TERMINATION OF EMPLOYMENT
3.1.022	4443	PERSONNEL INFORMATION OR ACTION FORMS	2	2	CONVENIENCE COPY; CONTAINS CONFIDENTIAL DATA. AccessHR ASSUMED THIS FUNCTIONALITY IN OCTOBER 2005.
3.1.023	4052	POSITION/JOB DESCRIPTIONS	AC+4	AC+4	Vital Record. AC=UNTIL SUPERCEDED OR JOB ELIMINATED. AccessHR ASSUMED THIS FUNCTIONALITY IN AUGUST 2005.
3.1.027	1856	TRAINING AND EDUCATIONAL ACHIEVEMENT RECORDS (INDIVIDUAL)	AC+6	AC+6	AC=COMPLETION OF CLASS. EXTENDED RETENTION PERIOD REQUIRED UNDER HIPAA (45 CFR SECTION 164.530(j)(1)-(2))
3.1.037	2872	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.
3.2.002	4003	EMPLOYEE EARNINGS RECORDS (INCLUDES PAYROLL WARRANT LISTING AND PAYROLL AFFIDAVIT)	4	4	Vital Record. BEGINNING 9/1/05 STAFF TO NOT SIGN TO RECEIVE CHECKS.
3.3.023	4630	REQUESTS AND AUTHORIZATIONS FOR REIMBURSABLE ACTIVITIES: TRAVEL, TUITION ASSISTANCE, ETC	FE+3	FE+3	TRAVEL OFFICE ASSUMED RETENTION OF TRAVEL REQUESTS BEGINNING OCTOBER 2005.

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3.4.002	2874	LEAVE STATUS REPORTS	FE+3		FE+3			Vital Record. BEGINNING OCTOBER 2005, RECORDS KEPT IN AccessHR.		
3.4.006	2744	TIME SHEETS	4		4			40 TAC815.106(i); BEGINNING OCT 2005, TIME SHEETS SENT TO RECORDS MANAGEMENT OFFICER FOR RETENTION.		
3.4.007	2745	TIME OFF AND/OR SICK LEAVE REQUESTS	FE+3		FE+3			BEGINNING OCTOBER 2005, RECORDS KEPT IN AccessHR.		
3.4.008	2875	SICK LEAVE POOL DOCUMENTATION	FE+3		FE+3					
4.2.002	4011	CASH RECEIPTS - SALE OF OPEN RECORDS, REMITTANCE FORMS	FE+3		FE+3					
4.7	2043	GRANTS INFORMATION FILES	AC+3		AC+3			Vital Record.		
5.1.001	5453	CONTRACTS	AC+4		AC+4			Vital Record. AC=EXPIRATION OR TERMINATION OF THE INSTRUMENT ACCORDING TO ITS TERMS		
5.1.004	3983	TELEPHONE LISTINGS	US		US					
5.1.004	4058	MAILING LISTS	US		US					
5.1.007	2878	REQUISITION FOR IN-AGENCY /INTER-AGENCY COPY/PRINTING SERVICE (INCLUDES FORMS D-8 AND D-9)	AV		AV					
5.1.011	2879	PHOTOCOPIER AND TELEFAX USAGE LOGS & REPORTS	AV		AV					
5.1.016	3829	TELEPHONE MESSAGE NOTIFICATIONS	1		1			INCLUDES E-MAILS, PHONE MESSAGE BOOKS AND SLIPS, ETC.		
5.2.010	4032	EQUIPMENT MANUALS	LA		LA					

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5.2.011	4061	EQUIPMENT WARRANTIES			AC+1			
5.2.014	2881	INVENTORY--ANNUAL PHYSICAL			FE+3		CONVENIENCE COPY. RECORD COPY IN EXECUTIVE AND STAFF OPERATIONS.	
5.3.007	6801	BRFSS REQUESTS FOR PROPOSALS (RFPs)			FE+3			
5.3.008	2883	PURCHASING LOGS			FE+3			
5.3.009	2884	REQUESTS FOR INFORMATION (FOR PURCHASES)			AC		AC=DATE OF DIRECT PURCHASE, ISSUANCE OF REQUEST FOR BIDS OR DECISION NOT TO PROCEED WITH THE PROCUREMENT, AS APPLICABLE.	
5.4.001	2885	ACCIDENT REPORTS & ASSOCIATED DOCUMENTATION			CE+5		Vital Record. ACCIDENT OR OCCUPATIONAL DISEASE REPORTS BY SUPERVISORS AND EMPLOYEES REQUIRED TO BE SUBMITTED TO TEXAS WORKERS' COMPENSATION COMMISSION. BEGINNING OCTOBER 2005, AccessHR ASSUMED THIS FUNCTIONALITY. PRIOR TO OCTOBER 2005, RECORD COPY WAS SENT TO AGENCY RISK MANAGER.	
5.4.013	2890	DISASTER PREPAREDNESS AND RECOVERY PLANS			US		Vital Record.	

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