

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

Agency Storage Total 8. Archival 9. Remarks

ORIGINAL SUBMISSION
 RECERTIFICATION
 REPLACEMENT PAGE
 ADDENDUM PAGE

10. 106 No.

016 - HEALTH SERVICE REGION - NURSING

4	MONTHLY BIOLOGICAL REPORTS (MONTHLY VACCINE REPORTING FORMS)	5		5		Vital Record.
11	SELECTED EMERGENCY IMMUNIZATION CLINIC RECORDS	CE+5	5	CE+10		Vital Record.
12	COMMUNICABLE DISEASE REPORTS	AV+5	5	AV+10		Vital Record.
992	MEDICAL RECORDS	AC		AC		Vital Record. AC=7 YEARS AFTER LAST DATE OF SERVICE, OR UNTIL PATIENT'S 21ST BIRTHDAY, WHICH EVER COMES LATER.
1499	IMMUNIZATION RECORDS	CE+5	5	CE+10		Vital Record. THESE ARE ADULT IMMUNIZATION RECORDS. SEE ALSO SCHEDULE # 010 FOR CHILDREN AND ADULT IMMUNIZATION RECORDS,
1500	CLIENT INFORMATION FORMS	AC+7		AC+7		NOTE: TO BE MAINTAINED AS LONG AS COMPANION MEDICAL RECORDS (SEE ALSO SCHEDULE # 010).
1501	CONSENT FORMS	CE+5	5	CE+10		NOTE: TO BE MAINTAINED AS LONG AS COMPANION MEDICAL RECORDS (SEE ALSO SCHEDULE # 010).
1502	MASTER INDEX FILE	AC+7		AC+7		NOTE: TO BE MAINTAINED AS LONG AS COMPANION MEDICAL RECORDS. NOW IN TWICES DATABASE.
1503	ADVERSE REACTION VACCINE REPORT	AC+7		AC+7		Vital Record.
1507	STANDING DELEGATION ORDERS	US+5		US+5		Vital Record.
5391	VACCINE INFORMATION DOCUMENTATION FORMS	4	20	24		
5393	DAY CARE REFERRALS	AC+3		AC+3		RETENTION MAY VARY TO COMPLY WITH SPECIFIC STATUTORY REQUIREMENTS
5400	RUBELLA REFERRALS	AC+1	1	AC+2		Vital Record.

RETENTION CODES (Field 7)

AC - After Closed, Terminated, Completed, Expired, Settled

AV - As Long As Administratively Valuable

CE - Calendar Year End
FE - Fiscal Year End
LA - Life of Asset

MO - Months
PM - Permanent
US - Until Superseded

ARCHIVAL CODES (Field 8)

A - Transfer to State
R - Review by State

VITAL Record (Include in Field 9)

Automated Facsimile of SLR-105

2. AGENCY CODE: 537 3. AGENCY: TEXAS DEPARTMENT OF STATE HEALTH SERVICES

___ ORIGINAL SUBMISSION
 X RECERTIFICATION
 ___ REPLACEMENT PAGE
 ___ ADDENDUM PAGE
 10. 106 No.

4. Records		7. RETENTION PERIOD						
Series Item #	5. Agency Item #	6. Records Series Title	Agency	Storage	Total	8. Archival	9. Remarks	10. 106 No.
016 - HEALTH SERVICE REGION - NURSING								
	5401	HEPATITIS B LOGS	AC+1		AC+1			
1.1	4643	CASE MANAGEMENT RECORDS	AC		AC		AC=SEVEN YEARS PAST THE LAST DATE OF SERVICE OR UNTIL THE PATIENT IS 21 YEARS OF AGE, WHICH EVER COMES LATER.	
1.1	5394	AUTOMATED INVENTORY REPORTS	CE+1	1	CE+2		Vital Record.	
1.1	5406	NIADS REMITTANCE & STATUS REPORT	6 MO	4YR6MO				05-537-179
1.1.002	1508	AUDITS - PATIENT RECORDS, WIC RECORDS AUDIT, M&CH AUDITS, TITLE XX AUDITS	AC+7		AC+7		M&CH=MATERNAL & CHILD HEALTH. AC=PUBLICATION OR RELEASE OF FINAL AUDIT FINDINGS. THE RECORD COPY OF ANY AUDIT PERFORMED BY THE STATE AUDITOR'S OFFICE IS RETAINED PERMANENTLY BY THE AGENCY.	
1.1.002	5437	AUDIT SURVEYS (CASA CLINIC, RETROSPECTIVE)	AC+3		AC+3	R	Vital Record.	
1.1.006	1509	COMPLAINT FILE	AC+2		AC+2		AC=FINAL DISPOSITION OF THE COMPLAINT	
1.1.007	1510	CORRESPONDENCE, ADMINISTRATIVE	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	1511	CORRESPONDENCE, GENERAL	1		1		INCLUDES SOME E-MAIL.	
1.1.013	1512	ITINERARY INFORMATION (APPOINTMENT BOOKS, MONTHLY CLINIC SCHEDULES, WIC CLASS SCHEDULES, WAITING LISTS	CE+1		CE+1	R	ONLY CALENDARS, APPOINTMENT, AND ITINERARY RECORDS OF EXECUTIVE STAFF, BOARD OR COMMISSION MEMBERS, DIVISION DIRECTORS AND SECTION/UNIT/BRANCH HEADS REQUIRE ARCHIVAL REVIEW.	
1.1.043	1519	TRAINING MANUALS	US+1		US+1			
1.1.063	1514	MEETING MINUTES/NOTES - STAFF	1		1			

RETENTION CODES (Field 7)

ARCHIVAL CODES (Field 8)

VITAL Record (Include in Field 9)

AC - After Closed, Terminated, Completed, Expired, Settled

AV - As Long As Administratively Valuable

CE - Calendar Year End
 FE - Fiscal Year End
 LA - Life of Asset

MO - Months
 PM - Permanent
 US - Until Superseded

A - Transfer to State
 R - Review by State

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

ORIGINAL SUBMISSION
 RECERTIFICATION
 REPLACEMENT PAGE
 ADDENDUM PAGE
10. 106 No.

4. Records Series Item #		5. Agency Item #	7. RETENTION PERIOD			9. Remarks
Series Item #	5. Agency Item #	6. Records Series Title	Agency	Storage	Total	8. Archival
016 - HEALTH SERVICE REGION - NURSING						
1.1.067	1517	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.						
1.1.070	1518	RULES AND REGULATIONS- FINAL	AC+3		AC+3	R
Vital Record. AC=COMPLETION OR TERMINATION OF PROGRAM, RULES, POLICIES OR PROCEDURES.						
1.1.071	919	RULES, POLICIES AND PROCEDURES-WORKING FILES	AC+3		AC+3	R
Vital Record. AC=COMPLETION OR TERMINATION OF PROGRAM, RULES, POLICIES OR PROCEDURES.						
2.2.011	1521	BATCH/DATA ENTRY CONTROL FORMS (WIC)	AC+3		AC+3	
RETENTION BASED ON FEDERAL GUIDELINES. AC=DATE OF FINAL EXPENDITURE REPORT AND ALL AUDIT FINDINGS HAVE BEEN RESOLVED.						
2.2.012	1522	COMPUTER PRODUCED OUTPUT	AV		AV	
Vital Record.						
5.1	4646	IMMUNIZATION SITE VISITS/CONTRACTOR QUALITY ASSURANCE REVIEWS	AC+4		AC+4	
SITE VISITS OR QUALITY ASSURANCE REVIEWS ON MEDICAID PROVIDER SERVICES MUST BE RETAINED FOR AC+5, WITH AC=UNTIL ALL AUDIT AND BILLING QUESTIONS ARE RESOLVED.						
5.1.001	13	CONTRACTS	AC+4		AC+4	
Vital Record. AC=EXPIRATION OR TERMINATION OF THE INSTRUMENT ACCORDING TO ITS TERMS						
5.1.001	27	PHYSICIANS UNDERSTANDING/AGREEMENTS	AC	4	AC+4	
Vital Record. AC=EXPIRATION OR TERMINATION OF THE INSTRUMENT ACCORDING TO ITS TERMS						

RETENTION CODES (Field 7)

ARCHIVAL CODES (Field 8)

VITAL Record (Include in Field 9)

AC - After Closed, Terminated, Completed, Expired, Settled

AV - As Long As Administratively Valuable

CE - Calendar Year End
FE - Fiscal Year End
LA - Life of Asset

MO - Months
PM - Permanent
US - Until Superseded

A - Transfer to State
R - Review by State