

Automated Facsimile of SLR-105

2. AGENCY CODE: 537

3. AGENCY: TEXAS DEPARTMENT OF STATE HEALTH SERVICES

ORIGINAL SUBMISSION

RECERTIFICATION

REPLACEMENT PAGE

ADDENDUM PAGE

4. Records

Series Item # 5. Agency Item #

6. Records Series Title

7. RETENTION PERIOD

Agency Storage Total 8. Archival 9. Remarks

10. 106 No.

125 - OFFICE FOR PRIORITY INITIATIVES COORDINATION

Series Item #	Agency Item #	6. Records Series Title	Agency	Storage	Total	8. Archival	9. Remarks
1.1.007	1025	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.)	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	1029	GENERAL CORRESPONDENCE (LIMITED TO DOCUMENTING THE ROUTINE OPERATIONS OF THE POLICIES, PROGRAMS, SERVICES OR PROJECTS.)	1		1		INCLUDES SOME E-MAIL.
1.1.013	1068	DESK CALENDARS/APPOINTMENT SCHEDULES	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.
1.1.024	1024	PLANS AND PLANNING RECORDS	AC+3		AC+3	R	AC=DECISION MADE TO IMPLEMENT OR NOT TO IMPLEMENT RESULT OF PLANNING PROCESS. INCLUDES PROJECT MANAGEMENT FILES AND DOCUMENTATION REQUIRED UNDER HB2292 CONSOLIDATION. PROJECT MGMT DOCUMENTATION MAY BE AUDITED. AT THE END OF THE RETENTION PERIOD THESE RECORDS ARE FORWARD TO THE STATE ARCHIVES TO PRESERVE HISTORICAL RECORD.
1.1.027	6831	PROPOSED LEGISLATION	AV		AV		INCLUDES DRAFTS AND RELATED CORRESPONDENCE.
1.1.057	1030	TRANSITORY INFORMATION	AC		AC		AC=PURPOSE OF RECORD HAS BEEN FULFILLED. INCLUDES TELEPHONE MESSAGE NOTIFICATIONS & SOME E-MAIL CONTAINING ROUTINE INFORMATION USED FOR COMMUNICATION, BUT NOT FOR THE DOCUMENTATION OF A SPECIFIC AGENCY TRANSACTION.
1.1.063	1093	STAFF MEETING MINUTES	1		1		(INCLUDES EXECUTIVE STAFF MEETINGS.)

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US - Until Superseded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)

VITAL Record (Include in Field 9)

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

**APPROVED 11/2/2006**

State of Texas  
Records Retention Schedule

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125 - OFFICE FOR PRIORITY INITIATIVES COORDINATION

1.1.065	6830	REPORTS AND STUDIES (NON-FISCAL) RAW DATA	AV		AV		SUPPORTING DOCUMENTATION FOR COMPLETED REPORTS	
1.1.067	6829	REPORTS AND STUDIES (NON-FISCAL)	3		3	A	(INCLUDES BOMER REPORT AND OTHER REPORTS REQUIRED BY LEGISLATURE.)	
1.1.070	2633	AGENCY RULES, POLICIES & PROCEDURES- FINAL	AC+3		AC+3	R	Vital Record. INCLUDES THE TDH/DSHS/HHS SAFETY MANUAL. AGENCY POLICIES AND RULES ARE SENT TO THE STATE ARCHIVES TO REVIEW IN ORDER TO PRESERVE THE HISTORICAL RECORD. AC=COMPLETION OR TERMINATION OF PROGRAM, RULES, POLICIES OR PROCEDURES.	
1.1.071	913	AGENCY RULES, POLICIES AND PROCEDURES-WORKING FILES	AC+3		AC+3	R	Vital Record. AC=COMPLETION OR TERMINATION OF PROGRAM, RULES, POLICIES OR PROCEDURES.	
3.1	6688	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. BEGINING 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	1130	APPLICATIONS FOR EMPLOYMENT - NOT HIRED	2		2		CONTAINS CONFIDENTIAL DATA. AccessHR ASSUMED THIS FUNCTIONALITY IN MAY 2005.	
3.1.014	1128	EMPLOYMENT SELECTION RECORDS	2		2		Vital Record. MAY CONTAIN CONFIDENTIAL DATA. AccessHR PARTIALLY ASSUMED THIS FUNCTIONALITY IN MAY 2005.	
3.1.019	1188	PEFORMANCE APPRAISALS/JOURNALS	2		2		MAY CONTAIN CONFIDENTIAL DATA.AccessHR ASSUMED THIS FUNCTIONALITY IN AUGUST 2005.	

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125 - OFFICE FOR PRIORITY INITIATIVES COORDINATION

3.1.023	1117	POSITION/JOB DESCRIPTIONS	AC+4		AC+4		Vital Record. AC=UNTIL SUPERCEDED OR JOB ELIMINATED. AccessHR ASSUMED THIS FUNCTIONALITY IN AUGUST 2005.	
3.3.023	1105	REIMBURSABLE ACTIVITIES, REQUESTS AND AUTHORIZATIONS TO ENGAGE IN	FE+3		FE+3		TRAVEL OFFICE ASSUMED RETENTION OF TRAVEL REQUESTS BEGINNING OCTOBER 2005.	
3.4.006	1070	TIME CARDS AND TIME SHEETS	4		4		40 TAC815.106(i); BEGINNING OCT 2005, TIME SHEETS SENT TO RECORDS MANAGEMENT OFFICER FOR RETENTION.	
3.4.007	1781	TIME OFF AND/OR SICK LEAVE REQUESTS/DAILY ABSENCE REPORTS	FE+3		FE+3		BEGINNING OCTOBER 2005, RECORDS KEPT IN AccessHR.	

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