

**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

X RECERTIFICATION

\_\_\_ REPLACEMENT PAGE

\_\_\_ ADDENDUM PAGE

4. Records

7. RETENTION PERIOD

Series Item #	5. Agency Item #	6. Records Series Title	Agency	Storage	Total	8. Archival	9. Remarks	10. 106 No.
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896 - TEXAS PRIMARY CARE (formerly COMMUNITY HEALTH RESOURCES)

	5123	APPLICATIONS OF NON-RESIDENT PHYSICIANS TO REMAIN IN U.S. (TEXAS CONRAD 30)	4		4			
1.1.007	3436	ADMINISTRATIVE CORRESPONDENCE	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	3437	CORRESPONDENCE, GENERAL	1		1		INCLUDES SOME E-MAIL.	
1.1.010	3443	DIRECTIVES - ROUTINE ISSUANCES REGARDING GENERAL ADMINISTRATIVE AND OFFICE PROCEDURES	US+1		US+1			
1.1.011	3444	EXECUTIVE ORDERS - RECORDS WHICH DOCUMENT SIGNIFICANT CHANGES OR NEW AGENCY POLICIES, PROGRAMS, AND/OR PROCEDURES	US+3		US+3	A	Vital Record.	
1.1.023	3445	ORGANIZATION CHARTS	US		US	A		
1.1.024	3446	PLANNING RECORDS	AC+3		AC+3	R	AC=DECISION MADE TO IMPLEMENT OR NOT TO IMPLEMENT RESULT OF PLANNING PROCESS	
1.1.038	3447	CUSTOMER SURVEYS	AC+3		AC+3		SEE ITEM NUMBER 1.1.067 FOR SUMMARY REPORTS COMPILED FROM CUSTOMER SURVEYS.	
1.1.040	3448	REPORTS, PAPERS & SPEECHES - CONFERENCES	AC		AC	R	AC=END OF TERM IN OFFICE OR TERMINATION OF SERVICE IN A STATE POSITION.	
1.1.057	5266	TRANSITORY INFORMATION	AC		AC		AC=PURPOSE OF RECORD HAS BEEN FULFILLED.	
1.1.063	3449	MEETING MINUTES/NOTES - STAFF MEETINGS	1		1			
1.1.065	3453	REPORTS & STUDIES - RAW DATA (NON-FISCAL	AV		AV			

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  
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3.1	6756	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	3463	APPLICATIONS - NOT HIRED	2		2		AccessHR ASSUMED THIS FUNCTIONALITY IN MAY 2005.	
3.1.014	3464	EMPLOYMENT SELECTIONS - INCLUDING INTERVIEW NOTES AND DOCUMENTATION OF SELECTION PROCESS	2		2		Vital Record. MAY CONTAIN CONFIDENTIAL DATA. AccessHR PARTIALLY ASSUMED THIS FUNCTIONALITY IN MAY 2005.	
3.1.019	3468	PEFORMANCE APPRAISALS/JOURNALS	2		2		MAY CONTAIN CONFIDENTIAL DATA. AccessHR ASSUMED THIS FUNCTIONALITY IN AUGUST 2005.	
3.1.020	3474	PERSONNEL CORRECTIVE ACTION DOCUMENTATION/PERFORMANCE ADVISEMENT FORMS	AC+5		AC+5		MAY CONTAIN CONFIDENTIAL DATA. AC=TERMINATION OF CORRECTIVE ACTION	
3.1.021	3484	PERSONNEL DISCIPLINARY ACTION DOCUMENTATION	AC+5		AC+5		Vital Record. AC=TERMINATION OF EMPLOYMENT	
3.1.023	3486	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	3487	TUITION ASSISTANCE & TRAVEL REQUESTS	FE+3		FE+3		TRAVEL OFFICE ASSUMED RETENTION OF TRAVEL REQUESTS BEGINNING OCTOBER 2005.	
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.	

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Series Item # 5. Agency  
Item #

6. Records Series Title

Agency Storage Total 8. Archival 9. Remarks

10. 106 No.

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5.1.004	3488	ADDRESS & TELEPHONE LISTING	US		US		
5.1.016	2148	TELEPHONE MESSAGE NOTIFICATIONS	1		1		PAPER AND ELECTRONIC. INCLUDES E-MAILS, PHONE MESSAGE BOOKS AND SLIPS, ETC.

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