

State of Texas
Records Retention Schedule

Recertified: 5/23/2012 **Updated (with or without**
Amendment Approved: 2/19/2014 **amendment): 10/3/2017**

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X RECERTIFICATION
___ REPLACEMENT PAGE
___ ADDENDUM PAGE

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			8. Archival	9. Remarks	10. 106 No.
			Agency	Storage	Total			

010 - HEALTH SERVICE REGION - MEDICAL RECORDS

3692		CD4 ONLINE MANAGEMENT PATIENT INFORMATION SYSTEM (COMPIS) REPORTS GENERATED FROM THE DATABASE.	AV		AV			
3693		PREVENTION COUNSELING NOTES, RISK REDUCTION PLANS, AND CASE MANAGEMENT RECORDS COMPILED ON HIV POSITIVE CLIENTS	AC		AC		AC=FOR ADULTS: 7 YEARS AFTER LAST DATE OF SERVICE OR PATIENT'S DEATH, IF KNOWN. AC=FOR CHILDREN: 3 YEARS AFTER 21ST BIRTHDAY, EVEN IN DEATH, OR 7 YEARS; WHICHEVER COMES LATER.	
3811		ADULT HEALTH PROGRAM RECORDS	AC+7		AC+7		Vital Record. AC= LAST SERVICE DATE. (22 TAC Rule §165.1)	
3812		CHILD HEALTH PROGRAM RECORDS	AC		AC		AC=PATIENT'S 21ST BIRTHDAY OR 7 YEARS PAST LAST SERVICE DATE, WHICHEVER COMES LATER. (22 TAC Rule §165.1)	
3813		CHILDREN WITH SPECIAL HEALTH CARE NEEDS PROGRAM RECORDS	AC		AC		AC=PATIENT'S 21ST BIRTHDAY OR 7 YEARS AFTER LAST SERVICE DATE, WHICHEVER IS LATER. (22 TAC Rule §165.1)	
3815		PHARMACY MANAGEMENT RECORDS	2		2		Vital Record. 22TAC§291.75. INCLUDES DISTRIBUTION DRUGS RECORDS (including Tuberculosis drugs); INVENTORY CONTROL OF DANGEROUS DRUGS & INVOICES; REPACKAGING CONTROL LOG; DRUG THERAPY MANAGEMENT RECORDS; PRESCRIPTIONS; SUPPLIERS INVOICES AND CREDIT MEMOS; AFTER HOURS LOGS; DESTRUCTION LOGS.	
3827		FAMILY HEALTH PROGRAM RECORDS	AC		AC		AC=LATER OF 21ST BIRTHDAY OF YOUNGEST CHILD OR 7 YEARS AFTER LAST SERVICE DATE. (22 TAC Rule §165.1) (some regional records not eligible for destruction until 2016)	

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3831		FAMILY PLANNING PROGRAM RECORDS (INVOLVING USE OF I.U.D.)	LA+AC		LA+AC		LA=LIFE OF I.U.D. DEVICE AC=LATER OF PATIENT'S 21ST BIRTHDAY OR 7 YEARS AFTER LAST SERVICE DATE. (22 TAC Rule §165.1)
3835		FAMILY PLANNING PROGRAM RECORDS (INVOLVING SURGICAL IMPLANTATION OF CONTRACEPTIVE)	LA+AC		LA+AC		LA=LIFE OF CONTRACEPTIVE AC=LATER OF PATIENT'S 21ST BIRTHDAY OR 7 YEARS AFTER LAST SERVICE DATE. (22 TAC Rule §165.1)
3849		FAMILY PLANNING PROGRAM RECORDS (NOT INVOLVING USE OF I.U.D. OR SURGICALLY IMPLANTED CONTRACEPTIVE)	AC		AC		AC=PATIENT'S 21ST BIRTHDAY OR 7 YEARS AFTER LAST SERVICE DATE, WHICHEVER COMES LATER. (22 TAC Rule §165.1)
3858		MATERNAL HEALTH PROGRAM RECORDS	AC		AC		AC=INFANT'S 21ST BIRTHDAY, MOTHER'S 21ST BIRTHDAY, OR 7 YEARS AFTER LAST SERVICE DATE, WHICHEVER COMES LATER. (22 TAC Rule §165.1)
3860		SEXUALLY TRANSMITTED DISEASE MEDICAL RECORDS CONTAINING POSITIVE SYPHILIS TESTS INCLUDING CONGENITAL SYPHILIS	AC		AC		AC=7 YEARS PAST PATIENT'S DEATH, IF KNOWN, OR 18 YEARS FROM THE LAST DATE OF SERVICE.
3861		SEXUALLY TRANSMITTED DISEASE MEDICAL RECORDS OTHER THAN POSITIVE SYPHILIS TESTS.	AC		AC		AC=7 YEARS PAST LAST DATE OF SERVICE OR PATIENT'S 21ST BIRTHDAY, WHICHEVER COMES LATER. (22 TAC Rule §165.1)
3871		ALL SEXUALLY TRANSMITTED DISEASE INTERVENTION RECORDS, AND HIV/AIDS DISEASE INTERVENTION RECORDS, INCLUDING INVESTIGATIONS, INTERVIEWS, AND DISEASE INTERVENTION CASE MANAGEMENT NOTES.	AC		AC		AC=3 YEARS PAST LAST DATE OF SERVICE OR PATIENT'S 21ST BIRTHDAY, WHICHEVER COMES LATER.
3873		TUBERCULOSIS PROGRAM RECORDS	AC		AC		AC=LATER OF PATIENT'S 21ST BIRTHDAY OR 7 YRS AFTER LAST SERVICE DATE. X-RAYS GIVEN TO PATIENT OR RETURNED TO PROGRAM MANAGER FOR DISPOSITION. (22 TAC Rule §165.1)

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010 - HEALTH SERVICE REGION - MEDICAL RECORDS

3875	COMMUNICABLE DISEASES PROGRAM RECORDS	AC	AC	AC	AC=PATIENT'S 21ST BIRTHDAY OR 7 YEARS AFTER LAST SERVICE DATE, WHICHEVER IS LATER. (22 TAC Rule §165.1)		
3878	HANSEN'S DISEASE RECORDS	PM	PM	PM	RETAINED FOR RESEARCH.		
3880	IMMUNIZATION RECORD AND FORMS - ADULT	CE+10	CE+10	CE+10	CE=END OF CALENDAR YEAR IN WHICH FORM WAS SIGNED.		
3881	IMMUNIZATION RECORD & FORMS -CHILDREN	AC	AC	AC	AC=CHILD'S 21ST BIRTHDAY OR 10 YEARS FOLLOWING END OF CALENDAR YR IN WHICH FORM WAS SIGNED, WHICHEVER IS LATER. WHEN USING THE C-100 FORMS IT IS NOT NECESSARY TO RETAIN THE VACCINE INFORMATION MATERIALS.		
3882	INFANT SCREENING FOR GENETIC OR METABOLIC DISORDERS	AC	AC	AC	AC=PATIENT'S 21ST BIRTHDAY. (22 TAC Rule §165.1)		
3883	HEALTH RISK APPRAISAL	AC	AC	AC	AC=PATIENT'S 21ST BIRTHDAY OR 7 YEARS AFTER LAST SERVICE DATE, WHICHEVER COMES LATER. (22 TAC Rule §165.1)		
3891	BLOOD PRESSURE SCREENING	AC	AC	AC	AC=PATIENT'S 21ST BIRTHDAY OR 7 YRS AFTER LAST SERVICE DATE, WHICHEVER COMES LATER. (22 TAC Rule §165.1)		
3894	BLOOD PRESSURE REFERRAL	AC	AC	AC	AC=LATER OF PATIENT'S 21ST BIRTHDAY OR 7 YEARS AFTER LAST SERVICE DATE. (22 TAC Rule §165.1)		
3895	HIV POSITIVE ANONYMOUS TEST RESULTS (INCLUDES SEROLOGY, COUNSELING NOTES, RISK REDUCTION PLAN, AND PREVENTION CASE MANAGEMENT RECORDS)	AC+1	AC+1	AC+1	AC=TEST DATE OR LAST DATE OF SERVICE; WHICHEVER COMES LATER.		

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3896		HIV NEGATIVE ANONYMOUS TEST RESULTS, INCLUDING SEROLOGY, COUNSELING NOTES, AND RISK REDUCTION PLAN.	AC	AC		AC=GIVEN TO CLIENT OR RETAINED FOR 90 DAYS AFTER TEST DATE; WHICHEVER COMES FIRST.	
4264		HIV POSITIVE CONFIDENTIAL TEST RESULTS INCLUDING SEROLOGY AND MEDICAL RECORDS.	AC	AC		AC=7 YEARS PAST PATIENT'S DEATH, IF KNOWN, OR 18 YEARS FROM LAST DATE OF SERVICE.	
4267		CD4 ONLINE MANAGEMENT PATIENT INFORMATION SYSTEM (COMPIS) DATABASE. (ELECTRONIC CLIENT SERVICE PROVISION RECORDS.)	AC+3	AC+3		AC=END OF RYAN WHITE TITLE II CONTRACT PERIOD. HARD COPY RECORDS AND DOCUMENTS FROM WHICH THE DATABASE IS DERIVED MUST BE RETAINED ACCORDING TO THE APPROPRIATE SCHEDULE.	
4276		HIV SERONEGATIVE CONFIDENTIAL TEST RESULTS, INCLUDING SEROLOGY, COUNSELING NOTES, AND RISK REDUCTION PLAN.	AC	AC		AC= 7 YEARS PAST THE LAST DATE OF SERVICE OR UNTIL PATIENT'S 21ST BIRTHDAY, WHICHEVER COMES LATER. (22 TAC Rule §165.1)	
4277		VISION, HEALTH & SPEECH SCREENING	AC	AC		AC=LATER OF PATIENT'S 21ST BIRTHDAY OR 7 YEARS AFTER LAST SERVICE DATE (SCREENINGS ARE MANDATED TO TAKE PLACE EVERY OTHER YEAR FROM PRESCHOOL THROUGH 7TH GRADE. (22 TAC Rule §165.1)	
4456		DIABETICS SCREENING	AC	AC		AC=LATER OF PATIENT'S 21ST BIRTHDAY OR 7 YEARS AFTER LAST SERVICE DATE. (22 TAC Rule §165.1)	
4507		OTHER LABORATORY SCREENINGS & TESTS	AC	AC		AC=PATIENT'S 21ST BIRTHDAY OR 7 YEARS AFTER LAST SERVICE DATE, WHICHEVER COMES LATER. (22 TAC Rule §165.1)	
4512		INFANT SCREENING FOR GENETIC OR METABOLIC DISORDERS	AC	AC		AC=PATIENT'S 21ST BIRTHDAY. (22 TAC Rule §165.1)	

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4520		DENTAL RECORDS	5		5		22 TAC Rule 108.8 (Dental Examiners Rules)	
4521		DENTAL REFERRALS	5		5		22 TAC Rule 108.8 (Dental Examiners rules)	
4526		COMMUNICABLE DISEASE SURVEILLANCE FORMS AND RECORDS	AC+2		AC+2		AC=MONTH OF MMWR YEAR CLOSEOUT AS DETERMINED BY EAIDB (USUALLY MARCH OF THE FOLLOWING YEAR). DOES NOT INCLUDE HIV/STD OR TB SURVEILLANCE FORMS. CONVENIENCE COPIES OF SELECTED FORMS ARE SENT TO THE EMERGING AND ACUTE INFECTIOUS DISEASE BRANCH.	
4662		MEDICAL CASE MANAGEMENT PATIENT RECORDS	AC		AC		AC=7 YEARS PAST THE LAST DATE OF SERVICE OR UNTIL THE PATIENT IS 21 YEARS OF AGE, WHICH EVER IS LONGER. (22 TAC Rule §165.1)	
4810		SPECIAL PROJECTS AND RESEARCH	AV		AV		USUALLY 10 YRS, BUT A DIFFERENT RET. PERIOD MAY BE ESTABLISHED AT PROJECT IMPLEMENTATION	
4979		WOMEN/INFANT/CHILDREN PROGRAM RECORDS	AC		AC		AC=3 YEARS FOLLOWING DATE OF SUBMISSION OF FINAL EXPENDITURES REPORT.	
6817		REGIONAL MASTER PATIENT INDEX (MASTER INDEX OF PATIENTS' MEDICAL RECORDS)	PM		PM			
7268		X-RAYS (NOT TUBERCULOSIS)	AC+5		AC+5		AC=DATE OF X-RAY. RADIOGRAPHIC FILMS, MAMMOGRAPHY FILMS. 42 CFR 482.26(d)(2). DOES NOT INCLUDE THE REPORT THAT INTERPRETS THE X-RAY. THE REPORT BECOMES A PART OF THE PATIENT'S MEDICAL RECORD.	
4.1	5010	FINANCIAL RECORDS RELATING TO PROGRAM SERVICES	FE+5		FE+5		MEDICARE/MEDICAID REQUIREMENTS ARE 6 YEARS RETENTION.	

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5.4.011	7024	CLINIC VISITOR LOG	3	3	PRIVACY PROTECTED BY HIPAA REGULATIONS. 45 CFR Section 164.530
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