

State of Texas
Records Retention Schedule

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

___ ORIGINAL SUBMISSION
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			

016 - HEALTH SERVICE REGION - NURSING

4		MONTHLY BIOLOGICAL REPORTS (MONTHLY VACCINE REPORTING FORMS)	5		5		Vital Record.	
12		COMMUNICABLE DISEASE REPORTS	AC+5	5	AC+10		Vital Record. AC=REPORT IS COMPLETE AND FINAL.	
1502		MASTER INDEX FILE	AC+7		AC+7		NOTE: TO BE MAINTAINED AS LONG AS COMPANION MEDICAL RECORDS. NOW IN TWICES DATABASE. AC=LAST DATE OF SERVICE	
1503		ADVERSE REACTION VACCINE REPORT	AC+7		AC+7		Vital Record. AC= DATE THAT ADVERSE REACTION WAS REPORTED.	
1507		STANDING DELEGATION ORDERS	US+5		US+5		Vital Record.	
2716		MONTHLY SHARPS CONTAINER INSPECTION LOG	3		3			
2717		MONTHLY EMERGENCY EQUIPMENT CHECKLIST	3		3			
5393		DAY CARE REFERRALS	AC+3		AC+3		RETENTION MAY VARY TO COMPLY WITH SPECIFIC STATUTORY REQUIREMENTS. AC=ENDING DATE OF ELIGIBIITY.	
5400		RUBELLA REFERRALS	AC+1	1	AC+2		Vital Record. AC=BIRTH OF BABY.	
5401		HEPATITIS B LOGS	AC+1		AC+1		AC=LOG IS COMPLETE AND FINAL	
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, WHICHEVER COMES LATER.	

RETENTION CODES (Field 7)

AC - After Closed, Terminated, Completed, Expired, Settled	CE - Calendar Year End	MO - Months
AV - As Long As Administratively Valuable	FE - Fiscal Year End	DA -Days
US -Until Superseded	PM - Permanent	LA - Life of Asset

ARCHIVAL CODES (Field 8)

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

VITAL Record (Include in Field 9)

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1.1	5437	QUALITY ASSURANCE REVIEW (CASA CLINIC, RETROSPECTIVE)	AC+3		AC+3	R	Vital Record. AC=DATE OF RECORDS REVIEW.
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.
1.1.013	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		
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.
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	27	PHYSICIANS UNDERSTANDING/AGREEMENTS	AC	7	AC+7		Vital Record. AC=EXPIRATION OR TERMINATION OF THE INSTRUMENT ACCORDING TO ITS TERMS

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