

State of Texas  
Records Retention Schedule

**Recertified: 5/23/2012**      **Updated (with or without**  
**Amendment Approved: 2/19/2014**      **amendment): 10/4/2017**

ORIGINAL SUBMISSION  
 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			

305 - LABORATORY SERVICES

325		QUALITY ASSURANCE (PEDIATRIC WELLNESS)	6 MO	20Y6MO	21		Frew Lawsuit. QA RECORDS FOR PEDIATRIC SCREENING TESTS (I.E. INSTRUMENT MAINTENANCE & QC; REAGENT QC; TEST LOGS; QA LOGS; PHONE LOGS; PROFICIENCY TESTS; TEMPERATURE LOGS; INSTRUMENT CALIBRATIONS).	05-537-015
326		QUALITY ASSURANCE (PATIENTS)	6 MO	20Y6MO	21		Frew Lawsuit. QA RECORDS FOR PATIENT TESTING (I.E. INSTRUMENT MAINTENANCE & QC; REAGENT QC; TEST LOGS; QA LOGS; PHONE LOGS; PROFICIENCY TESTS; TEMPERATURE LOGS; INSTRUMENT CALIBRATIONS).	05-537-014
327		QUALITY ASSURANCE AND QC (WATER - ENVIRONMENTAL)	1	11	12		RECORDS AND DOCUMENTS TO MEET REGULATORY REQUIREMENTS (I.E. AUDIT REPORTS, PT, QA, AND QC RECORDS).	05-537-050
330		REPORTS (PEDIATRIC WELLNESS)	1 MO	20Y11M	21		Frew Lawsuit. PEDIATRIC LABORATORY REPORTS.	05-537-047
331		REPORTS (PATIENTS)	1 MO	20Y11M	21		Frew Lawsuit. PATIENT REPORTS.	05-537-038
333		WORKSHEETS (ASBESTOS)	2	28	30		EPA REQUIRES ASBESTOS RECORDS BE RETAINED 30 YEARS	
334		WORKSHEETS (PEDIATRIC WELLNESS)	6 MO	20Y6MO	21		Frew Lawsuit. TESTING RECORDS FOR PEDIATRIC SCREENING TESTS (INTRUMENT PRINTOUTS & RUN QC; SPECIMEN PROCESSING DATA; TEST RESULTS; RAW DATA; ETC.).	05-537-016
335		WORKSHEETS (PATIENTS)	6 MO	20Y6MO	21		Frew Lawsuit. TESTING RECORDS FOR PATIENT TESTS (INSTRUMENT PRINTOUTS & RUN QC; SPECIMEN PROCESSING DATA; TEST RESULTS; RAW DATA; ETC.).	05-537-069

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DA -Days

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305 - LABORATORY SERVICES

336	WORKSHEETS (WATER - ENVIRONMENTAL)		1	11	12		SEE ITEM #327. CONTAINS RECORDS AND RAW DATA FROM ANALYSIS AND SUPPORTING DATA TO MEET REGULATORY REQUIREMENTS.	05-537-124
1215	HAZARDOUS WASTE		3		3		40 CFR PART 262.40	
1216	INFECTIOUS WASTE		3		3		30 TAC 330.1004	
1219	INDUSTRIAL WASTE DISCHARGE PERMIT		3		3		CITY OF AUSTIN INDUSTRIAL WASTE DISCHARGE PERMIT PART II, STANDARDS CONDITIONS, C-RECORDS RETENTION	
1230	WORKSHEETS (NON-HUMAN)		1	4	5		TESTING RECORDS FOR ARBOVIRUS AND RABIES TEAMS (INSTRUMENT PRINTOUTS & RUN QC; SPECIMEN PROCESSING DATA; TEST RESULTS; RAW DATA; ETC.).	05-537-337
1231	QC & QA RECORDS (NON-HUMAN)		1	4	5		QC RECORDS FOR ARBOVIRUS AND RABIES TEAMS (INSTRUMENT MAINTENANCE & QC; REAGENT QC TEST LOGS; QA LOGS; PHONE LOGS; PROFICIENCY TESTS; TEMPERATURE LOGS).	05-537-338
1237	MICRO - MILK TESTING RECORDS		2	3	5		RECORDS CORRESPONDING TO TESTING (I.E. SUBMISSION FORMS, WORKSHEETS, REPORTS, ETC.).	14-537-571
1834	MICRO - WATER TESTING RECORDS		3	9	12		RECORDS CORRESPONDING TO TESTING (I.E. WORKSHEETS, REPORTS, ETC.).	05-537-039
1835	REPORTS (WATER-ENVIRONMENTAL)		1	11	12		COPIES OF FINAL ANALYSIS REPORTS ISSUED.	05-537-137
1918	MEDIA PRODUCTION AND QC RECORDS		3	18	21		MEDIA PREPARATION RECORDS; MEDIA QC RECORDS	14-537-572

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	2833	MICRO - SHELLFISH TESTING RECORDS	5	5	10		RECORDS CORRESPONDING TO TESTING (I.E. SUBMISSION FORMS, WORKSHEETS, REPORTS, ETC)	14-537-573
	3908	MICRO - FOOD TESTING RECORDS	3	12	15		RECORDS CORRESPONDING TO TESTING (I.E. SUBMISSION FORMS, WORKSHEETS, REPORTS, ETC)	14-537-570
	4430	DEMOGRAPHIC FINAL WORKSHEETS	2 MO	1Y10MO	2		Vital Record. CLIA REQUIREMENTS IN 42 CFR 493.1107	05-537-353
	5898	WORKSHEETS (LEAD COPPER)	6 MOS	11Y6MO	12		SEE ITEM #327. CONTAINS RAW DATA FROM ANALYSIS, SUPPORTING DATA AS DETERMINED BY GROUP SUPERVISOR, QA OFFICER/BRANCH MANAGER. TO MEET EPA REQUIREMENTS.	06-537-522
	5899	REPORTS (LEAD COPPER)	6 MOS	11Y6MO	12		COPIES OF FINAL ANALYSIS REPORTS AND SUBMISSION FORMS ISSUED. TO MEET EPA REQUIREMENT.	06-537-521
	6816	NBS SUPPLY ORDER	6 MO	1YR6MO	2		NBS COLLECTION KITS REQUESTS. SAVE FOR SUBMITTERS' INQUIRIES.	08-537-545
1.1	272	CORRESPONDENCE (PEDIATRIC WELLNESS)	2	19	21		Frew Lawsuit.	05-537-072
1.1	273	CORRESPONDENCE, (PATIENTS)	1	4	5		LETTERS	05-537-073
1.1	1714	AUTHORIZATION TO RELEASE CONFIDENTIAL INFORMATION (HIPAA)	AC+6		AC+6		AC=AUTHORIZATION'S EXPIRATION DATE; 45 CFR 164.530 (j)(1)-(2)	
1.1	2549	TEST REQUISITIONS (PATIENTS)	2 MO	20Y10M	21		Vital Record. Frew Lawsuit.	05-537-324

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1.1	3307	RECORD OF HIPAA-AFFECTED DISCLOSURES	AC+6		AC+6		45 CFR 164.530 (j)(1)-(2); MAY BE INCLUDED WITHIN THE MEDICAL RECORD IF THE MEDICAL RECORD WILL BE MAINTAINED FOR AT LEAST 6 YEARS AFTER THE DISCLOSURE. AC=DATE OF DISCLOSURE	
1.1	4817	OTHER HIPAA PRIVACY DOCUMENTATION (INCLUDING LETTERS, MEMOS, FORMS)	6		6		45 CFR 164.530 (j)(1)-(2)	
1.1	4823	ACCESS TO HIPAA-AFFECTED INFORMATION - DENIED	AC+6		AC+6		45 CFR 164.530 (j)(1)-(2); AC=DATE OF DENIAL OF INFORMATION	
1.1	4824	AMENDMENT AND OTHER PRIVACY-RELATED REQUESTS-HIPAA (FOR RESTRICTIONS, ALTERNATE FORMATS/LOCATIONS, ETC.) - APPROVED	AC+1		AC+1		AC=DATE RECORD AMENDED OR REQUEST FILLED.	
1.1	4826	AMENDMENT AND OTHER PRIVACY-RELATED REQUESTS-HIPAA (FOR RESTRICTIONS, ALTERNATE FORMATS/LOCATIONS, ETC.) - DENIED	AC+6		AC+6		45 CFR 164.530 (j)(1)-(2); AC=DATE OF DENIAL OF INFORMATION	
1.1	5032	TEST REQUISITIONS (NON-HUMAN)	2 MO	6Y4MO	6Y6MO		Vital Record.	05-537-142
1.1	7236	TEST REQUISITIONS (PEDIATRIC WELLNESS)	2 MO	20Y10M	21		Vital Record. Frew Lawsuit. INCLUDING NBS, THC, AND OTHER CHILD HEALTH TESTING.	11-537-558
1.1.006	4635	COMPLAINTS RELATED TO PRIVACY (HIPAA)	AC+6		AC+6		45 CFR 164.530 (j)(1)-(2); AC=FINAL DISPOSITION OF COMPLAINT	
1.1.007	271	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.)	2	2	4	R	Vital Record. LETTERS DEVELOPMENT OF AGENCY POLICY & PROCEDURES. ONLY ADMINISTRATIVE CORRESPONDENCE OF EXECUTIVE STAFF, BOARD OR COMMISSION MEMBERS, DIVISION DIRECTORS AND SECTION/UNIT/BRANCH HEADS REQUIRE ARCHIVAL REVIEW.	

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1.1.008	274	GENERAL CORRESPONDENCE (LIMITED TO DOCUMENTING THE ROUTINE OPERATIONS OF THE POLICIES, PROGRAMS, SERVICES OR PROJECTS.)	2	2		LETTERS W/ROUTINE MATTERS. INCLUDES SOME E-MAIL.	
1.1.020	393	PUBLIC INFORMATION REQUESTS - NOT EXEMPTED	AC+1	AC+1		AC=DATE REQUEST IS FULFILLED; INCLUDES WRITTEN REQUESTS FOR PUBLICATIONS (TEXAS GOVT CODE 552.002)	
1.1.021	1444	PUBLIC INFORMATION REQUESTS - EXEMPTED (DENIED)	AC+2	AC+2		AC=DATE OF DENIAL OF REQUEST	
1.1.043	281	TRAINING MANUALS	US+1	US+1		MATERIAL DEVELOPED BY AGENCY FOR TRAINING	
1.1.057	486	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	275	MEETING MINUTES/STAFF NOTES	1	1		MINUTES OF INTERNAL STAFF MEETINGS	
1.1.063	1238	MEETING MINUTES/STAFF NOTES	2	2		STAFF MEETINGS WILL CONTAIN SOME QA REPORTS/NEED TO KEEP 2 YEARS FOR CLIA	
1.1.065	5557	REPORTS AND STUDIES (NON-FISCAL) - RAW DATA	AV	AV		INCLUDES NEWBORN SCREENING BLOODSPOTS.	
1.1.067	279	REPORTS & STUDIES (NON-FISCAL)	3	3	R	INTERNAL REPORTS & REPORTS SUBMITTED TO OTHER AGENCIES; IF REPORT HAS HISTORICAL RELEVANCE, DO NOT DESTROY REPORT BUT SEND IT TO THE STATE ARCHIVIST AT THE END OF THE RETENTION PERIOD.	

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1.1.070	277	POLICIES AND PROCEDURES MANUALS- FINAL	AC+3	AC+3	AC+3	R	Vital Record. AGENCY'S POLICIES & OPERATING PROCEDURES; MANUALS CONTAINING TESTING INFORMATION THAT HAS BEEN CHANGED OR DISCONTINUED. AC=COMPLETION OR TERMINATION OF PROGRAM, RULES, POLICIES OR PROCEDURES.	
1.1.070	278	POLICIES AND PROCEDURES (SCIENTIFIC)- FINAL	AC+3	AC+3	AC+3	R	Vital Record. AGENCY'S POLICIES & OPERATING PROCEDURES; MANUALS CONTAINING TESTING INFORMATION THAT HAS BEEN CHANGED OR DISCONTINUED. AC=COMPLETION OR TERMINATION OF PROGRAM, RULES, POLICIES OR PROCEDURES.	
1.1.071	5159	RULES, POLICIES AND PROCEDURES-WORKING FILES	AC+3	AC+3	AC+3	R	Vital Record. AC=COMPLETION OR TERMINATION OF PROGRAM, RULES, POLICIES OR PROCEDURES.	
1.2.006	5024	RECORDS TRANSMITTAL FORMS	AC+2	AC+2	AC+2		AGENCY COPY (INCLUDES RMD101 TX-R-5.306-58-1 & AGENCY STORAGE FORMS) AC=DATE OF AUTHORIZATION FOR DESTRUCTION OR TRANSFER	
2.2.016	5975	SOFTWARE REGISTRATIONS, WARRANTIES, AND LICENSE AGREEMENTS	LA+3	LA+3	LA+3		Vital Record.	
3.1	4405	EMPLOYEE IMMUNIZATION - MEDICAL RECORDS	2	8	10		Vital Record. IMMUNIZATION-MEDICAL RECORDS REQUIRE 10 YR RETENTION PERIOD.	05-537-346
3.1	6696	POSITIVE PERFORMANCE RECORDS (MAINTAINED BY SUPERVISORS)	AC	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 CAPPs TO DOCUMENT SECOND AND THIRD LEVEL REMINDERS. BUT A PAPER COPY IS STILL FORWARDED TO HHSC HR FOR EMPLOYEE'S MASTER PERSONNEL FILE.	

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3.1.014	289	EMPLOYMENT SELECTION RECORDS / NOTES (INCLUDES APPLICATIONS FOR EMPLOYMENT-NOT HIRED)	2		2		Vital Record maintained by CAPPs only. Send all records to CAPPs. CAPPs HAS FULLY ASSUMED THIS FUNCTIONALITY AS OF SEPT 2006.	
3.1.019	559	PERFORMANCE APPRAISALS/JOURNALS	AC+5		AC+5		MAY CONTAIN SOME CONFIDENTIAL INFORMATION SUCH AS MEDICAL INFORMATION, SOCIAL SECURITY NUMBER, OR OTHER DATA PROTECTED BY THE PRIVACY DOCTRINE. AC=TERMINATION OF EMPLOYEE. CAPPs ASSUMED THIS FUNCTIONALITY IN AUGUST 2005. HHS-HR MUST RECEIVE ALL PERFORMANCE APPRAISALS THAT ARE NOT ALREADY IN CAPPs. HHS-OGC REQUESTED LONGER RETENTION PERIOD.	
3.3	293	TRAINING SUPPORT DOCUMENTATION	AC+5		AC+5		DOES NOT INCLUDE HAZARDOUS MATERIAL, TRAINING RECORDS/AC=COMPLETION OF CLASS. PAPER AND ELECTRONIC.	
3.3.023	533	TRAVEL AUTHORIZATION REQUESTS	FE	3	FE+3		TRAVEL OFFICE ASSUMED RETENTION OF THIS RECORD BEGINNING OCTOBER 2005.	
3.4.004	4971	OVERTIME AUTHORIZATION	FE+5		FE+5		OVERTIME REQUESTS. BEGINNING OCTOBER 2005, RECORDS KEPT IN CAPPs.	
5.2.008	890	EQUIPMENT MAINTENANCE LOGS	LA	3	LA+3			05-537-222
5.2.010	310	EQUIPMENT MANUALS	LA+2		LA+2		EQUIPMENT MANUALS. CAP REQUIREMENT IS 2 YEARS PAST THE RETIREMENT OF THE EQUIPMENT.	
5.2.019	314	SERVICE ORDERS	1		1		MECHANICAL SERVICE FOR INSTALLATION OR REPAIR	

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5.4	311	5.4.003	AC+3		AC+3		AC=INSPECTION, OR DATE OF THE CORRECTION OF THE DEFICIENCY IF FOUND. INCLUDES PIPETTE CALIBRATION RECORDS.	
5.4	319	SAFETY INSPECTIONS, CERTIFICATES OF CERTIFICATION OF BIOLOGICAL HOODS	2	28	30		TO MEET THE REQUIREMENTS OF OSHA	11-537-559
5.4	1544	COPY OF MOVING AND NON-MOVING TRAFFIC VIOLATIONS (KEPT WITH PERFORMANCE APPRAISALS)	2		2		FOR STAFF WHO DRIVE 50% OR MORE ON AGENCY BUSINESS.	
5.4	5509	REVIEW OF APPROPRIATE LICENSURE FOR OPERATION OF MOTOR VEHICLE (KEPT WITH PERFORMANCE APPRAISALS)	2		2		FOR STAFF WHO DRIVE 50% OR MORE ON AGENCY BUSINESS.	
5.4.003	312	INSPECTION RECORDS (PATIENTS)	AC+3		AC+3		SEE AGENCY ITEM #326; AC=INSPECTION, OR DATE OF CORRECTION OF DEFICIENCY, IF REPORT SHOWS DEFICIENCY	
5.4.007	321	SAFETY TRAINING - HAZARDOUS MATERIALS	5		5			
5.4.009	1217	WORKPLACE CHEMICAL LIST	30		30		Vital Record. HAZARD COMMUNICATION STANDARD REQUIREMENT. HEALTH & SAFETY CODE 502.005(d) REQUIRES THIS LIST FOR AMOUNTS OF CHEMICALS OVER 55 GALLONS, 500 POUNDS OR IN EXCESS OF CERTAIN AMOUNTS FOR CERTAIN HIGHLY TOXIC OR DANGEROUSLY HAZARDOUS CHEMICALS.	
5.4.010	1227	SAFETY DATA SHEETS (SDS)	AC		AC		AC=AFTER SHEETS ARE UPDATED OR HAZARDOUS CHEMICAL NO LONGER STORED BY AGENCY, AS APPLICABLE	

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5.4.012	3782	SECURITY ACCESS RECORDS	AC+2	AC+2			Vital Record. (INCLUDES PASSWORDS & SIGNED STATEMENTS OR SIMILAR INSTRUMENTS OF ACCESS TO AGENCY FACILITIES, EQUIPMENT, OR AUTOMATED SYSTEMS) AC=UNTIL SUPERSEDED, DATE OF EXPIRATION, OR DATE OF TERMINATION, WHICHEVER IS SOONER.
5.6.005	323	VEHICLE USE REPORTS- OPERATION LOG	1	1			INCLUDES MILEAGE, FUEL/OIL CONSUMPTION, PASSENGERS CARRIED AND OTHER RELATED INFORMATION.

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