

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  
\_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			

673 - TEXAS CENTER FOR INFECTIOUS DISEASE

217	CLINICAL INFORMATION SYSTEM- NUCAMS	AV	AV	AV	INFORMATION IS DUPLICATED IN PATIENT RECORDS		
220	DISEASE INDEX	10	10	10			
227	DISCHARGE INDEX	10	10	10			
359	WORKING FILES-UTILIZATION AND REVIEW	FE+1	FE+1	FE+1	Vital Record.		
361	UTILIZATION REVIEW FORMS (MEDICARE PATIENTS)	AC+3	AC+3	AC+3	AC=END OF REVIEW. (FORMS RETAINED FOR THE PURPOSE THAT JOINT COMMISSION ACCREDITS HOSPITAL EVERY 3 YEARS)		
381	OUTPATIENT CLINIC MASTER INDEX	PM	PM	PM			
382	OUTPATIENT CLINIC MEDICAL RECORDS	10	10	10	Vital Record. (Health and Safety Code Title 4, §241.103)		
383	EMPLOYEE HEALTH RECORDS (SCREENING)	AC+30	AC+30	AC+30	OSHA 29 CFR 1910.1020 (D) (1); AC=TERMINATION OF EMPLOYMENT; HEALTH RECORDS: IMMUNIZATIONS, PHYSICAL, PPD, X-RAYS, LAB WORK INITIATED AT TIME OF EMPLOYMENT		
385	RADIOLOGICAL SERVICES RECORDS	AC+10	AC+10	AC+10	AC=LAST DATE OF TREATMENT; RADIOGRAPHIC FILMS, MAMMOGRAPHY FILMS, SCANS, AND OTHER IMAGE RECORDS AS APPROPRIATE		
420	OPC PATIENT REGISTERS	5	5	5	Vital Record. OPC=OUT PATIENT CLINIC; ORIGINAL MAINTAINED IN FINANCIAL SERVICES		
574	MASTER INDEX-RADIOLOGY DEPT.	PM	PM	PM			
958	NEW NUMBER PATIENT LOG BOOK	AV	AV	AV			

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1561		MENU & NUTRITIONAL ANALYSES	3		3			
1573		MENUS	US		US			
1575		MANUFACTURER RECALL DOCUMENTATION	LA		LA		Vital Record.	
1576		DIABETIC MEAL PLANS	5		5			
1577		WARD PATIENT DIET LISTS	2 MO		2 MO			
1581		DIET INSTRUCTION RECORDS	1		1			
1582		DIET CONSULTATION SHEETS	2		2			
1583		COOKS' WORKSHEETS	3 MO		3 MO			
1585		FOOD PREFERENCE SURVEYS	US		US			
1586		RECIPES	AV		AV			
1619		HISTORICAL VOLUNTEER SERVICE PROGRAM INFORMATION	AV		AV	R		
1631		CHARGE-OUT FILES	10		10		Vital Record. 3" X 5" CARDS	
1632		MASTER INDEX FILES - TEXAS CENTER FOR INFECTIOUS DISEASE	PM		PM		Vital Record. 3" X 5" CARDS	
1640		DEATH REGISTER	PM		PM			

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1641	BIRTH REGISTER		PM	PM			
1652	MEDICAL RECORDS - TEXAS CENTER FOR INFECTIOUS DISEASE		AC	AC			Vital Record. AC=LATER OF THE PATIENT'S 20TH BIRTHDAY OR 10 YEARS AFTER THE LAST DATE OF SERVICE. INCLUDES QUARANTINE AND PROTECTIVE ORDERS. WHEN THE RECORD IS CONVERTED TO MICROFORM THE PAPER VERSION MAY BE DESTROYED. (Health and Safety Code Title 4, §241.103)
1657	PHYSICIAN DELINQUENT CHART LISTING		3	3			Vital Record.
1681	SURVEILLANCE RECORDS		5	5			INCLUDES TUBERCULOSIS SURVEILLANCE CARDS
1707	LIBRARY CARD CATALOG (PATIENTS) (INCLUDES HEALTH SCIENCE LIBRARY)		US	US			SUBJECT, TITLE, AUTHOR, AND SHELF LIST CARDS 3" X 5" CARDS
1708	WITHDRAWN BOOKS (PATIENTS)		3	3			MAIN ENTRY OR BOOK CARD OF WITHDRAWN BOOKS, 3" X 5" CARDS
1710	INTERLIBRARY LOANS		AC+3	AC+3			3" X 5" CARDS. AC=DATE WHEN LOAN WAS COMPLETED.
1712	WITHDRAWN BOOKS/JOURNALS (HEALTH SCIENCE LIBRARY)		AC+3	AC+3			AC=DATE OF WITHDRAWAL
1724	PRESCRIPTION FILES		3	3			Vital Record. 4" X 6" & 3" X 8" CARDS
1728	NURSING STATION INSPECTION MANUAL & RECORD		2	2			
1729	DRUG USAGE REPORT		2	2			

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1730	NURSING ADMINISTRATION RECORDS		3	3			Vital Record.	
1732	PREPACKAGING MANUAL & RECORD		3	3			Vital Record.	
1742	CULTURE CONFIRMATION BY TEXAS DE-PARTMENT OF HEALTH		3	3			5" X 3" FORM, STATISTICAL & HISTORICAL INFORMATION AVAILABLE FROM TDH/DSHS.	
1745	REQUEST FORMS-MYCOLOGY (INPATIENT, OUTPATIENT, & REGION)		6 MO	6 MO			Vital Record. TRANSCRIBED TO PATIENT MEDICAL RECORD & SPECIMEN LOG WORK SHEET	
1746	MYCOLOGY SPECIMEN RESULTS		AC+2	AC+2			AC=DATE OF REPORT CONCERNING SPECIMENS. CONTAINS PATIENT IDENTIFICATION	
1755	QUALITY CONTROL RECORDS		FE+2	FE+2				
1757	QUALITY CONTROL RECORDS (MYCOBACTERIOLOGY)		2	2				
1759	QUALITY CONTROL (MEDIA)		2	2			BOUND VOLUMES	
1765	QUALITY CONTROL RECORDS (CHEMISTRY)		2	2				
1774	BLOOD SMEARS		1 WK	1 WK			TRANSFERRED TO COULTER PRINTER CARDS BLOOD SMEARS TAKEN ON 1" X 3" SLIDES	
1777	BLOOD BANK RECEIPT/ISSUE LOGS		5	5			Vital Record. REFERENCE OF PATIENT BLOOD TYPE, CROSSMATCH INFORMATION	
1778	BLOOD BANK PATIENT CARD FILE		5	5			Vital Record. 5" X 7" CARDS, BLOOD TYPE, CROSS-MATCH, AND ANTI-BODYSCREEN DATA	

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1779	SPECIMEN LOG BOOK		5		5		REFERENCE OF PATIENTS NAMES, LOCATION AND TESTS PERFORMED	
1780	QUALITY CONTROL RECORDS - SEROLOGY		2		2		BOUND VOLUMES - RECORD OF TEST CONTROLS	
1782	SEROLOGY SPECIMEN LOG BOOK		2		2			
1786	DECEASED PATIENT RECORDS - PATHOLOGY		PM		PM		ALSO MAINTAINED IN PATIENT'S MEDICAL RECORDS	
1791	SURGICAL ACCESSIONS BOOKS		10		10		IN ACCORD WITH HOSPITAL LICENSING STANDARDS ADOPTED BY TEXAS BOARD OF HEALTH JULY 20, 1985	
1794	NORMAL GYNECOLOGIC GLASS SLIDES		5		5		1"x 3" GLASS SLIDES	
1795	CYTOLOGY LOG BOOK		10		10			
1796	ABNORMAL GYNECOLOGIC SLIDES		10		10		1"x 3" GLASS SLIDES	
1800	ABNORMAL GYNECOLOGIC CYTOLOGY REPORTS		10		10			
1801	CYTOLOGY CROSS INDEX CARD FILE		10		10		3"x 5" CARDS	
1802	BLOOD UTILIZATION REPORT		10		10			
1803	AUTOPSY TISSUE BLOCKS		10		10		1"x 1" PARAFFIN BLOCKS	
1804	AUTOPSY TISSUE SECTION SLIDES		10		10		1"x 3" GLASS SLIDES	
1805	SURGICAL TISSUE BLOCKS		10		10		1"X 1" PARAFFIN BLOCKS	

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1806	SURGICAL TISSUE SECTION SLIDES		10	10			1"x 3" GLASS SLIDES	
2681	MEDICAL TRANSCRIPTION		AC+6 MO	AC+6 MO			AC=PATIENT'S DISCHARGE FROM HOSPITAL	
3102	FOOD TEMPERATURE RECORDS - SERVING LINE		5	5				
3104	PATIENT TRAY MONITORING		5	5				
3108	PATIENT NUTRITIONAL STATUS		5	5				
3110	CONSUMPTION RECORD		5	5				
3112	DAILY PATIENT COUNT		5	5				
3114	DISHWASHER TEMPERATURE RECORDS		5	5				
3116	NUTRITIONAL ASSESSMENT		5	5				
3118	NU-CAMS ORDERS (DIETARY)		2 MO	2 MO				
3137	REGISTERS		10	10			Vital Record. INCLUDES BRONCHOSCOPIES/ BRONCHOGRAMS; INTENSIVE CARE; RECOVERY ROOM; ANESTHESIA REGISTERS	
3138	DAILY INPATIENT CENSUS		10	10			Vital Record.	

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	5158	MEMORANDUM OF TRANSFER (MOT)	5	5			A COPY OF EACH MEMORANDUM OF TRANSFER WILL BE RETAINED BY BOTH THE TRANSFERRING AND RECEIVING HOSPITALS AND FILED SEPARATELY FROM THE PATIENT'S MEDICAL RECORD IN A MANNER THAT WILL FACILITATE ITS INSPECTION BY DSHS. THE MEMORANDUM WILL BE RETAINED FOR 5 YEARS FROM THE DATE OF TRANSFER (TITLE 25 PART 1 CHAPTER 133 SUBCHAPTER C RULE 133.44)	
1.1	226	OUTPATIENT CLINIC ACTIVITY MONTHLY REPORT	5		5			
1.1	376	CURRENT YEAR ADMISSION SLIPS	PM		PM			
1.1	1701	PRINTS (PHOTOS & NEGATIVES)	AV		AV		PHOTOGRAPHIC - PRINTS & NEGATIVES	
1.1	1703	SASCH HISTORICAL FILE	AV		AV	R	HOSPITAL REGULATIONS, STUDIES, STATE LAWS, ETC.	
1.1	1731	NURSING COUNTS OF CONTROLLED SUBSTANCE	AC+3		AC+3		Vital Record. AC=DATE OF THE COUNT.	
1.1	3120	HOSPITAL DISCHARGE DATA CERTIFICATION LETTER - THCIC	5		5		Vital Record.	
1.1	3124	HCFA 339 PROVIDER COST REPORT REIMBURSEMENT QUESTIONNAIRES	5		5			
1.1	3125	WORKFORCE CONTRACT QUARTERLY REPORT	5		5		Vital Record. COMPUTER PRINT-OUT, PAPER	
1.1	3133	BLUE CROSS BLUE SHIELD STATUS REPORT	7		7			
1.1	3141	MEDICAL RECORDS MONTHLY STATISTICAL REPORT	FE+5		FE+5		Vital Record.	

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1.1	3142	MEDICAL RECORDS ANNUAL STATISTICAL REPORT	10	10		Vital Record.	
1.1	5194	AUTHORIZATION TO RELEASE CONFIDENTIAL INFORMATION (HIPAA)	AC+6	AC+6		AC=AUTHORIZATION'S EXPIRATION DATE; 45 CFR 164.530 (j)(1)-(2)	
1.1	5204	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	5205	OTHER HIPAA PRIVACY DOCUMENTATION (INCLUDING LETTERS, MEMOS, FORMS)	6	6		45 CFR 164.530 (j)(1)-(2)	
1.1	5206	ACKNOWLEDGEMENT OF RECEIPT OF PRIVACY NOTICE (HIPAA)	AC	AC		RETAINED BY DSHS HOSPITALS AS DIRECT CARE PROVIDERS AS PART OF THE MEDICAL RECORD. AC=10 YRS AFTER LAST DATE OF SERVICE, OR UNTIL PATIENT'S 21ST BIRTHDAY, WHICHEVER COMES LATER.	
1.1	5208	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	5210	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	5213	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 INFORMATON	

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1.1.002	386	AUDITS	AC+1	6	AC+7		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.
1.1.004	388	BIENNIAL BUDGET REQUESTS	AC+4	2	AC+6	A	AC=SEPTEMBER 1 OF ODD-NUMBERED CALENDAR YEARS. ONLY COPIES OF SUPPORTING DOCUMENT SUBMITTED TO THE LEGISLATIVE BUDGET BOARD ARE ARCHIVAL.
1.1.006	362	COMPLAINT FILES	AC	2	AC+2		AC=FINAL DISPOSITION OF THE COMPLAINT
1.1.006	5201	COMPLAINTS RELATED TO PRIVACY (HIPAA)	AC+6		AC+6		45 CFR 164.530 (j)(1)-(2); AC=FINAL DISPOSITION OF COMPLAINT
1.1.007	363	CORRESPONDENCE, ADMINISTRATIVE (ALL OTHER AREAS) (LIMITED TO FORMULATION, PLANNING, IMPLEMENTATION, INTERPRETATION, MODIFICATION, OR REDEFINITION OF THE PROGRAMS, SERVICES OR PROJECTS & THE ADMINISTRATIVE REGULATIONS, POLICIES AND PROCEDURES THAT GOVERN THEM.)	4		4	R	Vital Record. ONLY ADMINISTRATIVE CORRESPONDENCE OF EXECUTIVE STAFF, BOARD OR COMMISSION MEMBERS, DIVISION DIRECTORS AND SECTION/UNIT/BRANCH HEADS REQUIRE ARCHIVAL REVIEW.
1.1.007	390	CORRESPONDENCE, ADMINISTRATIVE (FISCAL & VOLUNTEER SERVICES) 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.)	1	3	4	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	358	CORRESPONDENCE, GENERAL (ALL AREAS) (LIMITED TO DOCUMENTING THE ROUTINE OPERATIONS OF THE POLICIES, PROGRAMS, SERVICES OR PROJECTS.)	2		2		INCLUDES SOME E-MAIL.

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1.1.013	365	ITINERARY INFORMATION	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.	
1.1.014	1578	LEGAL OPINIONS	AV		AV	R		
1.1.020	463	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	464	PUBLIC INFORMATION REQUESTS - EXEMPTED (DENIED)	AC	2	AC+2		AC=DATE OF DENIAL OF REQUEST	
1.1.038	476	CUSTOMER SURVEYS	AC		AC		AC=FINAL DISPOSITION OF SUMMARY REPORT. (SURVEYS CANNOT BE DESTROYED UNTIL SUMMARY REPORT HAS BEEN SENT TO STATE ARCHIVIST AT THE END OF THE RETENTION PERIOD.) SEE 1.1.067 FOR SUMMARY REPORTS COMPILED FROM CUSTOMER SURVEYS.	
1.1.040	478	SPEECHES	AC		AC	R	AC=END OF TERM IN OFFICE OR TERMINATION OF SERVICE IN A STATE POSITION.	
1.1.043	1811	TRAINING MANUALS	US+1		US+1			

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1.1.048	961	LITIGATION FILES	AC+1	AC+1		R	AC=AS APPLICABLE, DECISION OF AN AGENCY NOT TO FILE A LAWSUIT OR DECISION THAT A LAWSUIT WILL NOT BE FILED AGAINST IT ON A MATTER; DISMISSAL OF A LAWSUIT FOR WANT OF PROSECUTION OR ON MOTION OF THE PLAINTIFF; OR FINAL DECISION OF A COURT IN A LAWSUIT
1.1.057	719	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.
1.1.058	366	MEETING MINUTES (BOARD MEETINGS); MEETINGS OF HAZMAT COMMITTEE, SAFETY COMMITTEE	PM	PM		A	
1.1.058	1691	THERAPEUTIC AGENCY BOARD & INFECTION CONTROL COMMITTEE MEETING MINUTES	PM	PM		A	
1.1.063	356	COMMITTEE MINUTES (STAFF MEETINGS)	1	1			
1.1.064	3150	PERFORMANCE MEASURES SUPPORTING DOCUMENTATION	FE+3	FE+3			Vital Record. DOCUMENTATION OF OUTPUT, OUTCOME, EFFICIENCY AND EXPLANATORY MEASURES IN AGENCY'S APPROPRIATIONS REQUEST OR STRATEGIC PLAN & PERFORMANCE MEASURES TO MANAGE AGENCY.
1.1.065	475	RAW DATA, REPORTS & STUDIES	AV	AV			
1.1.067	470	REPORTS & STUDIES (NON-FISCAL)	3	3		R	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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1.1.068	3152	PERFORMANCE MEASURES REPORT	AC+6	AC+6			AC=SEPTEMBER 1 OF ODD-NUMBERED CALENDAR YEARS
1.1.069	472	REPORTS, EMPLOYEE ACTIVITY & PRODUCTION TYPE REPORTS USED FOR WORKLOAD MEASURES, TIME STUDIES, AND FUNDING	1	1			
1.1.070	367	POLICIES AND PROCEDURES MANUAL- FINAL	AC+3	AC+3	R		Vital Record. AC=COMPLETION OR TERMINATION OF PROGRAM, RULES, POLICIES OR PROCEDURES.
1.1.070	3162	TRAINING MANUALS- FINAL	AC+3	AC+3	R		Vital Record. INCLUDES HAZMAT; LINEN; PEST CONTROL; ENVIRONMENTAL SERVICE MANUALS. AC=COMPLETION OR TERMINATION OF PROGRAM, RULES, POLICIES OR PROCEDURES.
1.1.071	4761	RULES, POLICIES AND PROCEDURES-WORKING FILES	AC+3	AC+3	R		Vital Record. AC=COMPLETION OR TERMINATION OF PROGRAM, RULES, POLICIES OR PROCEDURES.
1.2.001	394	DESTRUCTION SIGN-OFFS	FE+3	FE+3			CONVENIENCE COPY. RECORD COPY SHOULD BE FORWARDED TO RECORDS MANAGEMENT OFFICE AT CENTRAL OFFICE, AUSTIN.
1.2.005	395	RECORDS RETENTION SCHEDULE	US	US			
1.2.008	397	REQUEST TO DISPOSE OF STATE RECORDS	FE+3	FE+3			CONVENIENCE COPY. RECORD COPY SHOULD BE FORWARDED TO RECORDS MANAGEMENT OFFICE AT CENTRAL OFFICE, AUSTIN.
2.1	1661	DIAGNOSTIC RELATED GROUPING & CODING FILES	AV	AV			Vital Record.

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2.1.007	3161	QUICKEN PROGRAM	AC		AC		Vital Record. DOES NOT INCLUDE COMMERCIALY AVAILABLE SOFTWARE PROGRAMS. THIS RECORD SERIES ONLY APPLIES IF QUICKEN WAS ALTERED TO MEET HOSPITAL REQUIREMENTS. AC=UNTIL ELECTRONIC RECORDS ARE TRANSFERRED TO AND MADE USABLE IN A NEW SOFTWARE ENVIRONMENT OR THERE ARE NO ELECTRONIC RECORDS BEING RETAINED TO MEET AN APPROVED RETENTION PERIOD THAT REQUIRE THE SOFTWARE TO BE RETRIEVED AND READ. 13 TAC 6.94	
2.2.016	6956	SOFTWARE REGISTRATIONS, WARRANTIES, AND LICENSE AGREEMENTS	LA+3		LA+3		Vital Record.	
3.1	357	ACTIVE AND INACTIVE CREDENTIALS FILES (ON STAFF PHYSICIANS)	5		5		Vital Record.	
3.1	399	GRIEVANCE FILE (FISCAL)	AC+2		AC+2		Vital Record maintained only by HHS-Civil Rights.. MAY CONTAIN CONFIDENTIAL DATA; AC=FINAL DECISION ON GRIEVANCE. BECAUSE OF CONSOLIDATION OF HUMAN RESOURCES IN HHS ENTERPRISE, MAINTAINED IN HHS-CIVIL RIGHTS	
3.1	501	GRIEVANCE RECORD (PERSONNEL)	AC	2	AC+2		Vital Record maintained only by HHS-Civil Rights.. MAY CONTAIN CONFIDENTIAL DATA; AC=FINAL DECISION ON GRIEVANCE. BECAUSE OF CONSOLIDATION OF HUMAN RESOURCES IN HHS ENTERPRISE, MAINTAINED IN HHS-CIVIL RIGHTS	
3.1	3153	CONTINUOUS QUALITY IMPROVEMENT ASSESSMENTS	FE+2		FE+2		Vital Record. PAPER, ELECTRONIC	
3.1	3157	PERSONNEL INFORMATION FILES	AC+5		AC+5		AC=TERMINATION OF EMPLOYMENT	

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3.1	6727	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.	
3.1.001	488	APPLICATIONS & RESUMES OF PEOPLE NOT HIRED	2	2	2	29 CFR 1602.31 CONTAINS CONFIDENTIAL INFORMATION. CAPPs assumed this functionality in May 2005.	
3.1.011	495	EMPLOYEE'S INSURANCE FILE	AC+5	AC+5	AC+5	Vital Record. AC=UNTIL SUPERSEDED OR TERMINATION OF EMPLOYMENT. FOUND IN EMPLOYEE PERSONNEL FILE. (DOCUMENTS THAT SERVE AS PAYROLL DEDUCTION AUTHORIZATIONS MUST BE RETAINED FOR THE RETENTION PERIOD PRESCRIBED FOR 3.2.001)	
3.1.012	496	EMPLOYMENT ADVERTISEMENTS TO INCLUDE JOB OPENINGS, PROMOTIONS , TRAINING PROGRAMS, OR OPPORTUNITY FOR OVERTIME	2	2	2	29 CFR 1602.31 (STATE AGENCIES)	
3.1.014	498	EMPLOYMENT SELECTION RECORDS (INCLUDES APPLICATIONS FOR EMPLOYMENT-NOT HIRED)	2	2	2	Vital Record maintainted by CAPPs only. Send all records to CAPPs. CAPPs HAS FULLY ASSUMED THIS FUNCTIONALITY AS OF SEPT 2006.	
3.1.014	507	PRE-EMPLOYMENT PHYSICAL EXAMS	2	2	2	Vital Record. 29 CFR 1602.31 (STATE AGENCIES)	

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3.1.019	502	PERFORMANCE APPRAISALS/JOURNALS	AC+5	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.
3.1.023	506	POSITION/JOB DESCRIPTION	AC	4	AC+4		Vital Record. AC=UNTIL SUPERSEDED OR JOB ELIMINATED. AccessHR ASSUMED THIS FUNCTIONALITY IN AUGUST 2005.
3.1.026	520	SECURITY CLEARANCES/CRIMINAL HISTORY CHECKS	AC		AC		AC=THE CRIMINAL HISTORY RECORD HAS SERVED THE IMMEDIATE PURPOSE FOR WHICH IT WAS OBTAINED. CAPPS ASSUMED THIS FUNCTIONALITY IN MAY 2005.
3.1.027	5552	TRAINING AND EDUCATIONAL ACHIEVEMENT RECORDS (INDIVIDUAL)	AC+5		AC+5		AC=TERMINATION OF EMPLOYMENT. INCLUDES COMPETENCY. (SEE #7194 FOR HIPAA TRAINING)
3.1.027	7194	HIPAA TRAINING RECORDS	AC		AC		AC=5 YEARS PAST THE TERMINATION OF EMPLOYEE OR 6 YEARS PAST THE TRAINING; WHICHEVER IS LONGER. RETENTION PERIOD REQUIRED UNDER HIPAA (45 CFR SECTION 164.530(j)(1)-(2))
3.1.035	962	PERFORMANCE BONDS	AC+4		AC+4		Vital Record.AC=EXPIRATION OR TERMINATION OF THE BOND ACCORDING TO ITS TERMS.
3.2.001	403	EMPLOYEE DEDUCTION AUTHORIZATION	AC+1	4	AC+5		Vital Record. AC=AFTER TERMINATION OF EMPLOYEE OR AFTER AMENDMENT, EXPIRATION, OR TERMINATION OF AUTHORIZATION, WHICHEVER SOONER. (Kept with Employee Personnel file, #5864)

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3.2.002	404	EMPLOYEE EARNING RECORDS	CE+5		CE+5		Vital Record.	
3.2.003	405	FEDERAL TAX RECORDS (INCLUDES 1099, W-2, FICA AND OTHER TAX RECORDS)	AC+1	4	AC+5		Vital Record.	
3.2.004	406	INCOME ADJUSTMENT AUTHORIZATION	FE+5		FE+5		Vital Record.	
3.2.005	407	FORM W-4	FE+1	4	FE+5		Vital Record. AC=UNTIL SUPERSEDED, OBSOLETE, OR UPON SEPARATION OF EMPLOYEE.	
3.2.006	515	WAGE RATE TABLES	2		2		29 CFR 516.6(a) (2)	
3.3	510	TRAINING SUPPORT DOCUMENTATION	AC	2	AC+2		AC=COMPLETION OF CLASS	
3.3	3103	STAFF VARIANCES	5		5			
3.3.001	516	AFFIRMATIVE ACTION PLANS	FE+5		FE+5		29 CFR 30.8(e)	
3.3.004	517	BENEFIT PLANS	US	1	US+1		29 CFR 1627.3(b)(2)	
3.3.004	522	GROUP INSURANCE	US	1	US+1			
3.3.010	523	LABOR STATISTICS REPORT REPORTS PROVIDE STATISTICAL INFORMATION ON LABOR FORCE	3		3			
3.3.011	524	FORMER EMPLOYEE VERIFICATION RECORDS - PERSONNEL FILES (EMPLOYMENT HISTORY FILE) (NAME, SOCIAL SECURITY NUMBER, EXACT DATES OF EMPLOYMENT, LAST KNOWN ADDRESS, AND PUBLIC ACCESS OPTION FORM)	AC	75	AC+75		Vital Record. MINIMUM INFORMATION NEEDED TO VERIFY EMPLOYMENT	

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3.3.015	528	POSITION/JOB CLASSIFICATION REVIEW FILE	US	3	US+3		CONVENIENCE COPY
3.3.020	368	WORK SCHEDULES (OD ROSTER) (DUTY ROSTERS, TASK ASSIGNMENTS)	1		1		Vital Record.
3.3.023	529	REQUEST FOR TUITION ASSISTANCE	FE+3		FE+3		
3.3.026	519	EMPLOYEE LISTINGS IDENTIFIES EMPLOYEE BY SS#,NAME,OR POSITION	US+3		US+3		
3.3.026	521	EMPLOYEES HIRED DURING MONTH IDENTIFIES ALL POSITIONS FILLED	US+3		US+3		
3.3.026	526	POSITION STAFF REPORT PROVIDES DETAIL ACCOUNT OF ALL POSITIONS WITHIN THE ORGANIZATIONAL STRUCTURE OF THE AGENCY	US+3		US+3		
3.3.026	530	SUMMARY STAFFING REPORT (INFO FOR MONITORING STAFFING PATTERNS IN ORGANIZATIONAL ENTITIES)	US+3		US+3		
3.3.026	532	VACANCY REPORT PROVIDES A CENTRALIZED LISTING OF ALL VACANT POSITIONS IN EACH AGENCY	US+3		US+3		
3.3.030	1571	SAFETY TRAINING (NON-HAZARDOUS)	US+2		US+2		(MATERIALS AND RECORDS FOR INHOUSE TRAINING OF AGENCY PERSONNEL OF POLICES AND PROCEDURES.) TRAINING MATERIAL NOT FOUND IN TRAIN OR CAPPs. (DOES NOT INCLUDE HAZARDOUS MATERIAL TRAINING RECORDS).
3.3.031	492	EEO REPORTS AND SUPPORT DOCUMENTATION	3		3		29 CFR 1602.32

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3.4.002	534	LEAVE STATUS REPORT CUMULATIVE REPORT IS ISSUED EACH PAY CYCLE & PROVIDES EMPLOYEES LEAVE STATUS INFORMATION FOR EACH POSITION.	FE	5	FE+5		Vital Record. BEGINNING OCTOBER 2005, RECORDS KEPT IN CAPPS.
3.4.003	535	LESS THAN FULL-TIME WORKED	4		4		40 TAC 301.(a)(4)
3.4.004	536	OVERTIME AUTHORIZATIONS (PERSONNEL)	FE+5		FE+5		BEGINNING OCTOBER 2005, RECORDS KEPT IN CAPPS.
3.4.005	537	OVERTIME SCHEDULES (PERSONNEL)	FE+5		FE+5		
3.4.006	538	TIME CARDS & TIME SHEETS (PERSONNEL)	1	3	4		40 TAC815.106(i)
3.4.007	539	TIME OFF AND/OR SICK LEAVE REQUESTS (PERSONNEL)	FE	5	FE+5		BEGINNING OCTOBER 2005, RECORDS KEPT IN CAPPS.
4.1.002	1725	DRUG INVOICES	FE+3		FE+3		Vital Record.
4.1.002	3119	INTERAGENCY BILLINGS	FE+1	4	FE+5		HOSPITAL IS REQUIRED TO KEEP THESE RECORDS FOR FIVE YEARS
4.1.003	444	CANCELLED CHECKS	FE+1	2	FE+3		
4.1.004	415	ENCUMBRANCES	FE+1	2	FE+3		
4.2.002	416	CASH RECEIPTS (& MAIL OPENING LISTS)	FE+1	2	FE+3		
4.2.002	1537	CASH RECEIPTS (FOOD SERVICE)	FE+3		FE+3		
4.2.006	419	JOURNAL VOUCHERS	FE+1	2	FE+3		

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4.3	422	TRAVEL LOGS (FISCAL)	FE+1	2	FE+3		Vital Record.
4.3.003	421	PROFESSIONAL FEE LOGS	FE+1	2	FE+3		Vital Record.
4.3.003	3130	EXPENDITURE REPORT	FE+3		FE+3		
4.4.001	423	GENERAL LEDGER AND OPERATING LEDGER	FE+1	2	FE+3		Vital Record.
4.4.002	424	ACCOUNTS RECEIVABLE LISTING	FE	5	FE+5		Vital Record. MAINTAINED TO MEET MEDICARE REQUIREMENTS
4.4.002	425	PATIENT FINANCIAL FILES	AC	5	AC+5		Vital Record. MAINTAINED TO MEET MEDICARE REQUIREMENTS. AC=LAST PATIENT ENCOUNTER.
4.4.002	1793	LABORATORY CHARGE CARDS - PATHOLOGY	FE+3		FE+3		Vital Record. INFORMATION TRANSFERRED TO PATIENT ACCOUNTING RECORD
4.4.002	3126	AGING REPORT	FE+3		FE+3		Vital Record.
4.5	1669	HOSPITAL ARPB FINANCIAL RECORDS	AC+5		AC+5		AC=DATE OF MEDICARE/MEDICAID REIMBURSEMENT.
4.5	3132	MEDICARE AND MEDICAID HOSPITAL AND PHYSICIAN REMITTANCE ADVICE BINDERS	10		10		
4.5.001	430	MEDICARE COST REPORT WORKPAPERS	FE+2	3	FE+5		REQUIRED BY MEDICARE
4.5.001	431	PERSONNEL SERVICES SCHEDULE (WORKPAPERS, WORKSHEETS FOR PREPARING FISCAL REPORTS, DEPRECIATION LISTING, SS RECOMPUTATIONS)	FE+1	2	FE+3		
4.5.001	433	OPERATING BUDGET WORKPAPERS	FE+1	2	FE+3		

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4.5.002	369	INTERNAL MANAGEMENT REPORT & DEPARTMENT BUDGET REPORTS	FE+1	2	FE+3			
4.5.002	1601	MONTHLY REPORTS (CHARGES & COLLECTIONS)	FE+3		FE+3			
4.5.002	3131	MONTHLY FINANCIAL STATEMENT	5		5		HOSPITAL IS REQUIRED TO RETAIN FOR FIVE YEARS	
4.5.003	370	ANNUAL REPORTS - THOSE NOT REQUIRED BY MEDICARE	AC+6		AC+6		Vital Record. AC=DATE OF FINAL REPORT. COPY MAINTAINED AT DSHS.	
4.5.005	434	ANNUAL REPORTS - REQUIRED BY MEDICARE	FE+1	4	FE+5		REQUIRED BY MEDICARE	
4.5.005	435	MEDICARE COST REPORTS	FE+2	3	FE+5		REQUIRED BY MEDICARE	
4.5.005	436	PERFORMANCE REPORTS (INCLUDES EXTERNAL SPECIAL PURPOSE REPORTS)	FE+1	2	FE+3			
4.5.005	3122	MEDICAID COST REPORTS	5		5		RETENTION IS BASED ON FEDERAL REQUIREMENTS.	
4.5.006	437	OPERATING BUDGETS	FE+1	2	FE+3			
4.6.002	438	RECONCILIATIONS	FE+1	2	FE+3		INCLUDES APPROPRIATION AND PROPERTY; CASHIER BACK-UP DOCUMENTS; FUND/BUDGET TO ACCOUNTING DETAIL	
4.6.003	440	CASH COUNTS AND SPOT COUNTS	FE+1	2	FE+3			
4.7.001	442	ACCOUNTING POLICIES AND PROCEDURES	US+1	2	US+3		Vital Record.	
4.7.002	443	BANK STATEMENTS	FE+1	2	FE+3			

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4.7.004	965	CAPITAL ASSET RECORDS	LA+3		LA+3		Vital Record.	
4.7.008	446	FEDERAL GRANT INFORMATION	AC+3		AC+3		Vital Record. AC=SATISFACTION OF ALL UNIFORM ADMINISTRATIVE REQUIREMENTS FOR GRANTS AND COOPERATIVE AGREEMENTS TO STATE AND LOCAL GOVERNMENTS (THE COMMON RULE).	
4.7.011	447	TEXAS FACILITIES COMMISSION STATEMENTS	FE+1	2	FE+3			
4.7.012	3143	SIGNATURE CARDS FOR MEDICAL RECORD DOCUMENTATION	US+FE+3		US+FE+3			
5.1	219	CORRESPONDENCE BOOK (OUT-PATIENT CLINIC)	PM		PM		PATIENTS' MEDICAL INFORMATION	
5.1.001	570	CONTRACTS/LEASES	AC+7		AC+7		Vital Record. AC=EXPIRATION OR TERMINATION OF THE INSTRUMENT ACCORDING TO ITS TERMS	
5.1.003	981	DELIVERY REPORTS	2		2			
5.1.004	546	MAILING LISTS	US		US			
5.1.004	1689	ADDRESS & TELEPHONE LISTING, (ADDRESSES, INCLUDES VOLUNTEER, BOARD MEMBERS LISTING)	US		US			
5.1.010	3156	OPERATIONAL PERMITS, LICENSES, AND CERTIFICATIONS	AC+2		AC+2		Vital Record. AC=EXPIRATION DATE OF LICENSE OR PERMIT	
5.1.013	392	INSURANCE POLICIES	AC+4		AC+4		Vital Record. AC=EXPIRATION OR TERMINATION OF THE POLICY ACCORDING TO ITS TERMS.	
5.1.015	1816	CORRESPONDENCE TRACKING RECORDS	1		1			

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5.2	577	INVENTORY STOCK CARDS	FE+3		FE+3			
5.2	1572	TEMPERATURE RECORDS (REFRIGERATION EQUIPMENT)	FE+1 MO		FE+1 MO			
5.2	1589	COLD STORAGE INVENTORIES	US		US			
5.2	1682	DEPARTMENT AUTOCLAVING RECORDS	AC+1		AC+1		AC=DATE OF QUALITY ASSURANCE REVIEW.	
5.2	1709	ACCESSION RECORDS (LIBRARY)	LA		LA			
5.2	1760	AUTOCLAVE CHARTS	10		10		Vital Record. CONTAINS PATIENT IDENTIFICATION	
5.2	3163	HOSPITAL MATERIALS MANAGEMENT/INVENTORY AP/GL FINANCIAL RECORDS	FE+3		FE+3			
5.2.003	1624	BLUE PRINTS AND ARCHITECTURAL DRAWINGS	LA		LA	R	Vital Record.	
5.2.006	982	CERTIFICATION OF DESTRUCTION OF PROPERTY	FE+3		FE+3		Vital Record.	
5.2.008	1744	EQUIPMENT MAINTENANCE-INSTRUMENT FUNCTION CHECKS/MAINTENANCE RECORDS	LA+3		LA+3		Vital Record.	
5.2.010	1566	EQUIPMENT MANUALS	LA		LA			
5.2.014	448	ANNUAL PHYSICAL INVENTORIES	FE+1	2	FE+3			
5.2.015	1100	INVENTORY REMOVAL NOTICE	FE+3		FE+3			

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5.2.016	1104	INVENTORY SYSTEM UPDATE LISTING	AC	AC		AC=TRANSFER OF INFORMATION INTO ANNUAL LISTING	
5.2.017	1120	LOST & STOLEN PROPERTY REPORTS	FE+3	FE+3		Vital Record.	
5.2.019	346	KEYS/PAGER REFERENCE LOG (REPAIRS)	1	1			
5.2.019	1625	WORK ORDERS	1	1			
5.2.020	352	SUPPLY USAGE REPORTS	FE+1	FE+1		INCLUDES STOCK ISSUES-ORIGINAL ORDER.	
5.2.021	1218	SURPLUS PROPERTY SALE REPORTS	FE+3	FE+3		Vital Record.	
5.2.023	1535	YEAR TO DATE ACTIVITY (INVENTORY LISTING)	FE+3	FE+3			
5.3	977	FIXED ASSET HAND RECEIPT	FE+3	FE+3		Vital Record. COMPUTER PRINT OUT AND PAPER	
5.3	2985	PROCUREMENT CARD PURCHASES SUPPORTING DOCUMENTATION	FE+3	FE+3			
5.3.003	1539	FREIGHT CLAIMS	AC+2	AC+2		Vital Record. AC=RESOLUTION OF CLAIM	
5.3.007	568	PURCHASE ORDERS/BID DOCUMENTATION	FE+3	FE+3		Vital Record.	
5.3.008	1556	PURCHASING LOG	FE+3	FE+3			
5.4	3154	MEDICAL WASTE MANAGEMENT REPORTS	30	30			

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5.4.001	500	ACCIDENT REPORTS & ASSOCIATED DOCUMENTATION	CE	5	CE+5		Vital Record. 29 CFR 1904.6 RECORD COPY MAINTAINED BY INDUSTRIAL ACCIDENT BOARD. MAY CONTAIN SOME CONFIDENTIAL INFORMATION
5.4.003	1570	SAFETY INSPECTIONS; ENVIRONMENTAL POLLUTION CONTROL TESTS	AC+3		AC+3		AC=INSPECTION OR DATE OF THE CORRECTION OF THE DEFICIENCY IF THE INSPECTION REPORT REVEALS A DEFICIENCY.
5.4.003	1775	BLOOD BANK MAINTENANCE LOGS	10		10		CHARTS - TEMPERATURE CHARTS OF REFRIGERATORS, FREEZERS, & INCUBATORS; RETENTION IS CAP AND CLIA REQUIREMENT
5.4.007	561	SAFETY TRAINING - HAZARDOUS MATERIALS	30		30		RETENTION IS A CAP AND CLIA REQUIREMENT.
5.4.007	3134	HAZMAT DRILLS	5		5		Vital Record.
5.4.009	1739	LABORATORY WORK PLACE CHEMICAL LIST & MATERIAL SAFETY DATA SHEETS	30		30		Vital Record. OSHA - 29CFR1910.1020 - SUPPORT Z(d)(1)(ii)(B)
5.4.009	3158	HAZMAT CHEMICAL LISTING	30		30		Vital Record. 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	3159	MATERIAL SAFETY DATA SHEETS	AC		AC		Vital Record. AC=AFTER SHEETS ARE UPDATED OR UNTIL HAZARDOUS CHEMICAL NO LONGER STORED BY HOSPITAL, AS APPLICABLE
5.4.011	1574	VISITOR CONTROL REGISTER	3		3		

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5.4.012	518	EMPLOYEE IDENTIFICATION; KEY REFERENCE LOGS, CONTROLS	AC+2	AC+2		Vital Record. AC=UNTIL SUPERSEDED, DATE OF EXPIRATION, OR DATE OF TERMINATION, WHICHEVER SOONER.	
5.4.013	482	DISASTER PREPAREDNESS AND RECOVERY PLAN	US	US		Vital Record.	
5.5.002	224	DAILY FAX ACTIVITY LOG BOOK	AV	AV			
5.5.004	348	SWITCHBOARD DAILY LOG	AV	AV			

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