

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			

894 - TEXAS PRIMARY CARE OFFICE

	5123	APPLICATIONS OF NON-RESIDENT PHYSICIANS TO REMAIN IN U.S. (TEXAS CONRAD 30)	4		4			
1.1.008	7253	GENERAL CORRESPONDENCE (LIMITED TO DOCUMENTING THE ROUTINE OPERATIONS OF THE POLICIES, PROGRAMS, SERVICES OR PROJECTS.)	2		2		INCLUDES SOME E-MAIL.	
1.1.013	7254	CALENDARS / APPOINTMENT BOOKS/ ITINERARY RECORDS	CE+1		CE+1	R	INCLUDES OUTLOOK CALENDAR. ONLY CALENDARS, APPOINTMENT, AND ITINERARY RECORDS OF EXECUTIVE STAFF, BOARD OR COMMISSION MEMBERS, DIVISION DIRECTORS AND SECTION/UNIT/BRANCH HEADS REQUIRE ARCHIVAL REVIEW.	
1.1.020	7255	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	7256	PUBLIC INFORMATION REQUESTS - EXEMPTED (DENIED)	AC+2		AC+2		AC=DATE OF DENIAL OF REQUEST	
1.1.024	183	PLANS AND PLANNING RECORDS	AC+3		AC+3	R	AC=DECISION MADE TO IMPLEMENT OR NOT TO IMPLEMENT RESULT OF PLANNING PROCESS	
1.1.040	2062	REPORTS AND PAPERS & SPEECHES- CONFERENCE	AC		AC	R	AC=END OF TERM IN OFFICE OR TERMINATION OF SERVICE IN A STATE POSITION.	
1.1.043	3964	TRAINING MATERIALS/MANUALS	US+1		US+1		INSTRUCTION MATERIALS DEVELOPED BY AN AGENCY FOR TRAINING ENTITIES OR INDIVIDUALS IT REGULATES OR SERVES. NOT INTERNAL TRAINING MATERIALS.	

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US -Until Superseded	PM - Permanent	LA - Life of Asset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)

VITAL Record (Include in Field 9)

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

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1.1.057	4165	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	2039	MEETING AGENDAS AND MINUTES	PM	PM	A		AGENCY RETAINS PERMANENT RECORD COPY. THE ARCHIVAL REQUIREMENT IS MET BY SENDING A COPY TO THE OFFICE OF THE ARCHIVIST WHEN THE MEETING AGENDA AND MINUTES ARE OFFICIALLY APPROVED.
1.1.063	4038	MEETING MINUTES/NOTES - STAFF	1	1			
1.1.065	1001	REPORTS, STUDIES, AND SURVEYS-RAW DATA (non-fiscal)	AV	AV			
1.1.067	2042	REPORTS AND STUDIES	3	3	R		AT THE END OF THE RETENTION PERIOD, IF THE REPORT HAS HISTORICAL IMPORTANCE, THE REPORT SHALL BE FORWARDED TO THE OFFICE OF THE STATE ARCHIVIST INSTEAD OF UNDERGOING DESTRUCTION.
1.1.070	2101	RULES, POLICIES & PROCEDURES, INSTRUCTION MANUALS - FINAL	AC+3	AC+3	R		Vital Record. AC=COMPLETION OR TERMINATION OF PROGRAM, RULES, POLICIES OR PROCEDURES.
1.1.071	4200	RULES, POLICIES AND PROCEDURES-WORKING FILES	AC+3	AC+3	R		Vital Record. AC=COMPLETION OR TERMINATION OF PROGRAM, RULES, POLICIES OR PROCEDURES.

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3.1	6718	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 CAPPs TO DOCUMENT SECOND AND THIRD LEVEL REMINDERS, BUT A PAPER COPY IS STILL FORWARDED TO HHSC HR FOR EMPLOYEE'S MASTER PERSONNEL FILE.
3.1.006	2116	EMPLOYEE COUNSELING NOTES	AC+3	AC+3			AC=TERMINATION OF COUNSELING. KEEP THIS RECORD SEPARATE FROM PERFORMANCE APPRAISAL.
3.3.020	4045	WORK SCHEDULES/ASSIGNMENTS	1	1			
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.
4.7.008	6226	FEDERAL GRANT RECORDS	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).
5.1.004	892	ADDRESS AND TELEPHONE LISTING	US	US			
5.1.007	1768	REQUISITION FOR IN-AGENCY /INTER-AGENCY COPY/PRINTING SERVICE	AV	AV			

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