

## FERRIS STATE UNIVERSITY

### Schedule 2006.001- Birkam Health Center Center

N.b. If departments are unable to retain records for the length of time set out in this general record schedule due to space constraints, consult the University's Archivist for assistance and storage at the Record Center.

Item No	Record Series, Title and Description	Department Retention	Records Center Retention	University Archives
1	<b>Accounting Records.</b> Includes bank account statements, budget spreadsheets, departmental billing, records, inventory records, purchase orders with check documentation, purchase order logs, receipts travel records and other documentation. For outstanding insurance accounts, destroy seven years after settling the account.	CR+7 Destroy		
2	<b>Appointment Records.</b> Sheets/ electronic files recording appointments. Information also available in patient records. Confidential destruction required.	1 week Destroy		
3	<b>Clinical Laboratory Improvement Amendment (CLIA) Records.</b> Lists of names kept in accordance with the Congressional quality standards act in 1988.	CR+1 Destroy		
4	<b>Departmental Subject Files.</b> These records are used to document the Center's normal activities. A subject file typically includes annual reports, budgets, correspondence, evaluations, goals and objectives, meeting agendas and minutes, organizational information, planning documents, program reviews, and reports. A record becomes inactive when it ceases, been disbanded or the individual is no longer involved.	CR+9		Yes
5	<b>Exposure Records.</b> Records relating to hazardous material incidents on campus which may include: test results, leave certifications, medical certifications and supporting documentation such as blood tests, vision tests and hearing tests.	CR+29		
6	<b>HIV Testing Records.</b> Records include HIV counseling and testing report forms. Records become inactive on the date of the last reactive/positive tests. Records for patients which also indicate syphilis must be kept until the patient is deceased.	ACT +5 Destroy		
7	<b>Outreach Publication Records.</b> Flyers, handouts, pamphlets, posters, training material and workshop material on counseling and mental health topics as created by staff. Whenever possible, a copy should be sent the University Archives upon creation.	CR+9		Yes

Item No	Record Series, Title and Description	Department Retention	Records Center Retention	University Archives
8	<p><b>Personnel and Payroll Records.</b> These records are files maintained by departments regarding employees and student employees within each department. These generally include confidentiality statements, copies of Employee Assignment Action forms (EAA's), performance evaluations, Intent to Hire forms, Drug Free Workplace letters, excused absence forms, recap time sheets, and other copies of similar records, but do not include records pertaining to work study or similar financial aid records for student employees. Do not need to certify destruction.</p>	ACT+5 Destroy		
9	<p><b>Personnel Records, Students.</b> EAAs, resumes, excused absence forms, performance evaluations and timesheets. Originals of appropriate records should be sent to HRD. Paper backup of student hours verification may be destroyed at the end of a year</p>	CR+3 Destroy		
10	<p><b>Patient Records- Minors (under 18).</b> Information sheets, HIPPA privacy releases, blood tests, charts, notes, test results and other supporting documentation about patients of the clinic. Records become inactive when patients have not had an appointment in five years or when a student has graduated. Confidential destruction required.</p>	When patient turns 18 +9years Destroy.		
11	<p><b>Patient Records (Non-Employee).</b> Information sheets, HIPPA privacy releases, blood tests, charts, notes, test results and other supporting documentation about patients. Records become inactive when patients have not had an appointment in five years or when a student has graduated. Confidential destruction required.</p>	ACT+9 Destroy		
12	<p><b>Patient Records (Employees).</b> Information sheets, HIPPA privacy releases, charts, notes, test results and other supporting documentation about patients. Records become inactive when employees have left the employ of the university. Confidential destruction required.</p>	ACT+29		
13	<p><b>Syphilis Testing Records.</b> Testing forms and supporting that show that a patient has tested positive for syphilis. Records become inactive once a patient has died.</p>	ACT Destroy		
14	<p><b>University Subject Files.</b> These records are used to document the Birkam Health Center's involvement and operations within the university. A subject file typically includes budgets, correspondence, consultations, evaluations, goals and objectives, meeting agendas and minutes, organizational information, planning documents, program reviews, and reports. A record becomes inactive when it ceases, been disbanded or the individual is no longer involved.</p>	CR+9		Yes

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**Key:**

ACT = Active  
CR = Creation  
SUP = Retain Until Superseded  
CY = Calendar Year (current)  
ID = Immediate Disposal  
FY = Fiscal Year (current)  
PM = Permanent  
y = year(s)