

FERRIS STATE UNIVERSITY

Schedule 2004.0063- Counseling 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	Accounting Records. Includes asset control record, bank statements, departmental billing records, inventory reports, requisitions, purchase orders with check documentation, purchase order logs, travel records and other documentation.	CR+7 Destroy		
2	Appointment Records. Records detailing clinic visits and meetings for both staff and clients.	CR+2 Destroy		
3	Outreach Publication Records. 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+10		Yes
4	Personnel and Payroll Records. 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.	ACT+5 Destroy		
5	Policies and Procedures Records. Policies and procedures created by the Counseling Center including: departmental specific policies, procedures and staff training manuals and University policies/procedures which relate directly to the Center. Records become inactive when they have been superceded.	ACT		Yes
6	Student Client Records. Files of Counseling Center patients including academic information, intake forms, case notes, communications, inventories, release forms, test results and data entered into the Harm Reduction program. Records become inactive when a student has completed counseling or has not returned within a semester.	ACT+10 Destroy		
7	University Subject Files. These records are used to document the Counseling Center's involvement and operations within the university. A subject file typically	CR+10		Yes

Item No	Record Series, Title and Description	Department Retention	Records Center Retention	University Archives
	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.			

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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)