

## FERRIS STATE UNIVERSITY

### Schedule 2004.017- Optometry Clinic

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 daily cash reports/ business summary transaction sheets, deposit slips, credit card batch slips, insurance billing forms, purchase orders, POWCs, payment net and bank statements. Confidential destruction required.	CR+7 Destroy		
2	<b>Authorization Records.</b> Forms completed by patients allowing the release of records.	CR+10 Destroy		
3	<b>Minor Patient Records (under 18).</b> Information sheets, HIPPA privacy releases, 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. Confidential destruction required.	When patient turns 18 +10 years Destroy.		
4	<b>Patient Records.</b> Information sheets, HIPPA privacy releases, 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. Confidential destruction required.	ACT+10 Destroy		
5	<b>University Subject Files.</b> These records are used to document the individual's involvement and knowledge of the activities of the university. A subject file typically includes correspondence, consultations, evaluations, notes, organizational information, reports, publications and campus surveys. May include special project undertaken by the office such as awareness programs.	ACT+10		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 SUP = Retain Until Superseded  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)