# OutsideClinic- Audiology and Optical Retention Schedule

All OutsideClinic Information must be kept in accordance with this retention schedule, as required by the Data Protection Policy and the Records Management & Information Policy. In the event that employees identify any discrepancies or areas which are not covered by this retention schedule this should be promptly reported to the Chief Operating Officer for review.

## **Retention Schedule**

|  |  |  |  |
| --- | --- | --- | --- |
| **ASSET-ID** | **RECORD TYPE** | **RETENTION PERIOD** | **JUSTIFICATION / REFERENCES** |
| Optical Records | | | |
| A1 | Adult Optical Health Care Records | 10 years after they were last seen, even if the patient has subsequently died. | Best Practice – Recommendation by the College of Optometrists |
| A2 | Children Optical Health Care Records  (under the age of 18) | 10 years after they were last seen or until the patient’s 25th birthday, if later.  If the child or young person has died, keep the records for 10 years after they were last seen. | Best Practice – Recommendation by the College of Optometrists |
| Audiology Records | | | |
| B1 | Adult audiology health records | 7 years from last contact | [Best Practice guidance from the British Association of Hearing Aid Audiologists](https://bshaa.org/wp-content/uploads/2020/05/BSHAA_Guidance_on_Record_Keeping_-_updated_January_2020.pdf) |
| B2 | Children audiology health records | 10 years after they were last seen or until the patient’s 25th birthday, if later.  If the child or young person has died, keep the records for 10 years after they were last seen. | Department for Health & Social Care Guidance |
| General Customer Records | | | |
| C1 | General enquiries around services and products – unless it forms part of an existing client record (A1,A2, B1 or B2) | 6 years from last contact | Limitation Act 1980 |
| C2 | Complaints and incident records – unless formulates part of an existing client record (A1, A2, B1 or B2) | 6 years from last contact  Note: Records relating to health care will be retained in regards with the relevant retention period | Limitation Act 1980 |
| C3 | Data Protection Requests and correspondence | 6 years from last contact | Limitation Act 1980 |
| C4 | Call recording | 6 months from creation of the record  Unless the record relates to an incident or complaint in which case the relevant retention will apply | Business need |
| C5 | Distribution lists/ Contact data bases | 2 years from last contact  Data may be deleted if individual has opted out or if a valid request to object/erase or restrict has been received. | Business Need  Data Protection Act 2018  ICO Guidance |
| C6 | Customer feedback and surveys  (where not a complaint)  Unless it forms part of the client record (A1, A2, B1 or B2) | 2 years from last contact  Data may be deleted if individual has opted out or if a valid request to object/erase or restrict has been received. | Business need  Data Protection Act 2018  ICO Guidance |
| C7 | Payment information & financial transactions | 6 years from transaction | Limitation Act 1980 |
| C8 | Marketing records | 6 years from last use | Limitation Act 2018  Privacy and Electronic Communications Regulations  Data Protection Act 2018 |