

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 IT Director for review.

Retention Schedule

ASSET-ID	RECORD TYPE	RETENTION PERIOD	JUSTIFICATION / REFERENCES
Optical Records			
A1	Adult Optical Health Care Records (including safety incidents)	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) (including safety incidents)	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 (including safety incidents)	7 years from last contact	Best Practice guidance from the British Association of Hearing Aid Audiologists
B2	Children audiology health records (including safety incidents)	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
C9	Warranty information for products purchased through Outside Clinic and its subsidiaries	2 years from purchase, or the warranty period where it is extended. Details of prescriptions will sit within the medical records as outlined at A1, A2, B1 & B2 of this retention schedule	Business need and contractual obligation