

Mental Health, Department of
April 16, 2026

Division	Schedule No.	Schedule Title	Schedule Description	Disposition Instructions
All Divisions	3862	Division Client Files	This series consists of client files located in all divisions of the Center. The volume of records on hand varies by division as well as the annual accumulation rate. It is cut off at the end of the year.	Hold in the current files area five (5) years; then dispose.
Boswell Regional Center - Support Services	5144	Case Management Records	This series consists of files related to case management services for individuals who reside in the community and need assistance to access services to meet their individual medical, social, educational, and/or recreational needs. Included are access sheets, individual rights forms, eligibility certificates, case management service agreements, certification for services, intakes and histories, evaluation data files, case management service assessments, summaries of services, contact summaries, incident reports, and other related files.	Authentically reproduce paper files. Hold paper files and unimaged electronic records seven (7) years, then dispose. Authenticated reproduction must be verified and audit must have been released three (3) years prior to disposal. Hold authenticated reproduction permanently.
Boswell Regional Center - Support Services	5150	Census Record Files	This series consists of daily and nightly checks of individuals who reside at the Boswell Regional Center. The actual checks are known as census reports. Included are bed checks, daily census files, individual days off-campus files, admission files, discharge files, and transfer files which are compiled into one document referred to as the census report.	Authentically reproduce paper files. Hold paper files and unimaged electronic records seven (7) years, then dispose. Authenticated reproduction must be verified, and audit must have been released three (3) years prior to disposal. Hold authenticated reproduction permanently.

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Boswell Regional Center - Support Services	5112	Client Accident and Incident Reports	This series consists of accident and incident reports documenting accidents occurring to individuals receiving services. A report is completed when there are noticeable signs of an injury. This information is duplicated within the agency at the Risk Management Department.	Hold in the current files area five (5) years, then dispose.
Boswell Regional Center - Support Services	5106	Radio and Pager Log Books	This series consists of radio and pager log books. Included is information regarding the nature of the page and to whom the page was generated over the Boswell radio system. This system is utilized by Boswell staff to locate and contact other staff regarding many issues (telephone calls, visitors, appointments, and assistance). These are maintained by the switchboard operator to document radio or page events.	Hold in the current files area three (3) years, then dispose.
Ellisville State School	5316	Beauty/Barber Shop Special Instructions/Requests/Res trictions Files	This series consists of files related to specific instructions related to the grooming of clients' hair at beauty salons and barber shops. Included are beauty/barber shop special instruction forms/request/restriction forms and related files.	Hold in the current files area one (1) year, then dispose.

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Ellisville State School	5116	Clinic Forms (Miscellaneous) Temporary Files	This series consists of files related to patient appointments at the Ellisville State School Clinic. This series only indicates the date of a client's and has limited medical information about a client's history. Included are medical procedure reports, daily clinic logs, daily hospital logs, copies of physician billing correspondence, memos, e-mail and other related files.	Hold in the current files area (1) month after client's appointment, then dispose.
Ellisville State School	5305	Clothing Coordination Files	This series consists of paper and electronic files related to the inventory and maintenance of clients' clothing. Included are initial inventory files, addition/deletion files, order forms, count and distribution sheets, check-out forms, mending request forms, wardrobe assignment files, monthly inventory files and related records.	Hold in the current files area two (2) years after client has been discharged, then dispose.
Ellisville State School	5317	Copies of Medical Files	The series consists of copies of medical files related to assessing and assuring that medication is administered to clients. The original series is located in clients' medical records. Included are criteria for medication preparation and drug pass files, medical procedure reports, copies of medical records and other files.	Hold in the current files area one (1) year after the original files are stored in Medical Services, then dispose.
Ellisville State School	5311	Cottage Log and Bed Check Files	This series consists of cottage activity and client bed check files. Included are bed check and bed rest forms, activity files and related files.	Hold in the current files area five (5) years, then dispose.

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Ellisville State School	5319	Cottage Scheduling and Assignment Files	This series consists of files of employee schedules and assignments related to the care of clients. Included are shift cottage schedules, checklists, programmatic schedule reviews, employee performance records, support release/restraint documentation files, transport schedules and other files.	Hold in the current files area two (2) years, then dispose.
Ellisville State School	5192	Daily Census Files	This series consists of records of the daily head count of clients of the facility.	Hold paper and electronic files in the current files area six (6) years, then dispose.
Ellisville State School	5290	Donation Files	This series consists of files related to donor contributions of money, clothing, equipment or other items. Documentation includes donor's name, address, telephone number, item(s) donated, donor signature, signature of the person receiving donation, date and related information.	Hold paper files until authentically reproduced and verified, then dispose of paper files. Hold authenticated reproduction permanently.
Ellisville State School	5141	Drug Release Take Home Medication Record Forms	This series consists of Drug Release Take Home Medication Record Forms of clients served, which authorizes home medication for the client. Forms are signed by the client's nurse, physician, or nurse practitioner.	Hold in the current files area ten (10) years, then dispose.
Ellisville State School	5289	Employee of the Month Files	This series consists of files related to individuals who were either nominated for or received the employee of the month award. Documentation includes employee names, position, attendance, performance, and signature endorsement files.	Hold in the current files area seven (7) years, then dispose.

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Ellisville State School	5271	Equipment Checklist Files	This series consists of files related to the maintenance of the cooking and kitchen equipment. Included are maintenance reports, compartment sink logs, pot washer logs, dishwasher logs, temperature logs, and other related files.	Hold in the current files area one (1) year, then dispose.
Ellisville State School	5320	Equipment Usage and Reporting Files	This series consists of files related to equipment used by employees. Included are vehicle reservation files, on-call radio check out forms, radio sign-in/out sheets, smoke detector sign in/out forms, keys sign in/out forms, lantern/flashlight sign in/out forms, smoke detector checklists, severe weather preparedness checklists, broken glass reports, mosquito reporting forms and related files.	Hold in the current files area one (1) year, then dispose.
Ellisville State School	5140	In-House Requisition Record Forms	This series consists of In-House Requisition Record Forms, which document the medical supplies needed for clients with mental retardation who reside in Intermediate Care Facilities for the Mentally Retarded (ICF/MR) licensed facilities.	Hold in the current files area ten (10) years, then dispose. Audit must have been released three (3) years prior to disposal.
Ellisville State School	5288	Job Fair Files	This series consists of files related to job fairs sponsored by the agency. Included are job notices, web-site files, salaries, and related files.	Hold in the current files area one (1) year after job fair, then dispose.

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Ellisville State School	5282	Key Files	This series consists of forms related to the employees' authorization to receive keys to property owned by the agency. Documentation includes employee's name, unit, department, department director's approval, signature, number of keys, key number, date issued, and date returned.	Hold in the current files area one (1) year after key/keys have been returned, then dispose.
Ellisville State School	5273	Kitchen Cleaning Checklists	This series consists of checklists used by kitchen staff to ensure the cleanliness of the kitchen and equipment. Documentation includes types of equipment, employee/employees responsible for cleaning, and supervisor's signature.	Hold in the current files area three (3) years, then dispose.
Ellisville State School	5221	Leisure Services Files	This series consists of leisure activities files of clients which include camp fear acknowledgment forms, zone participation rosters, and dance, movie, gym, pool attendance forms, and other related files.	Hold in the current files area three (3) years, then dispose. Audit must have been released three (3) years prior to disposal.
Ellisville State School	5272	Meal Count and Menu Files	This series consists of files related to food menus and tallies of meals served. Included are campus menus, menu change sheets, meals served count files, and other related files.	Hold in the current files area three (3) years, then dispose.
Ellisville State School	5191	Monthly Departmental Reports	The series consists of monthly department reports. Included are reports, year-to-date client census reports, summaries, client days reports, and other related files.	Hold paper files in the current files area until after limited, non-electronic data is keyed into database (conversion) and electronic form is verified, then dispose. Hold electronic files permanently.

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Ellisville State School	5314	Pass Authorization and Contact Files	This series consists of files related to clients' family and friend contacts and clients 'off-campus pass authorizations.	Hold in the current files area one (1) year, then dispose.
Ellisville State School	5171	Pre-Vocational Records	This series consists of files for clients who seek job training under the pre-vocational program. Included are review authorizations, pre-admission and interdisciplinary recommendations, community employment and pre-vocational assessments, habilitation plans and related files.	Hold active records in the current files area until inactive, then transfer to inactive (thinned) records area. Digitally reproduce and verify records. Dispose of paper records and hold authenticated reproduction permanently in the agency.
Ellisville State School	5207	Program Files	This series consists of files related to client monitoring. Included are action request forms, attendance sheet workshop checklists, client functional assessment-extended education files, progress report tracking files, quarterly percentage of client attendance files, team reporting document files, training center evaluation and transfer files, unit staff/client ratio files, weekly percentage of client attendance files and other related files.	Hold in the current files area three (3) years after updated, then dispose. Audit must have been released three (3) years prior to disposal.
Ellisville State School	5287	Request for Financial Assistance Volunteer Files	This series consists of forms requesting donor funds for specific client activities or projects. Documentation includes client's name, unit of residence, reason for request, cost of items or service, client funds available, amount of request, person making request, date, and related files.	Hold paper files until authentically reproduced and verified, then dispose of paper files. Hold authenticated reproduction permanently. Audit must have been released three (3) years prior to disposal.

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Ellisville State School	5187	Risk Management Client Safety Files	This series consists of files related to injuries and accidents that are not indicative of abuse. Included are client-on-client accident/incident reports, five or more accident/incident reports, quarterly reports of client accident/incident by cause, and other	Hold in the current files area one (1) year, then dispose.
Ellisville State School	5186	Risk Management Facility Safety Files	The series consists of files related to safety compliance. Included are employee accident/injury information forms, liability claim reporting forms, safety inspections, hot water temperature checklists, vehicle driver monitor inspections, fire alarm system inspections, weekly generator inspections, monthly generator inspections, and other related files.	Hold in the current files area five (5) years, then dispose.
Ellisville State School	5188	Risk Management Identification Accident/Incident Report for Client Rec	This series consists of files relating to clients with accident/incident injuries that are not subject to further investigation. This series describes the accident/incident and the injury. Included are accident/incident reports of clients, witness files, injury description files, treatment files, administrator's reviews, medical reviews, and other	Hold in the current files area three (3) years, then dispose.

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Ellisville State School	5185	Risk Management Investigation Files	This series consists of files related to investigations of alleged abuses and/or injuries of clients with special needs served in the residential or community programs operated by Ellisville State School. Included are incident reports, interview sheets, accident/checklist reports for clients, reports of incidents to the Department of Health and the Attorney General's Office, final reports, witness statements, correspondence and permission files related to polygraphs, administrative leave with pay files, and other related files.	Hold in the current files area ten (10) years, then dispose.
Ellisville State School	5206	Sheltered Workshop Department of Labor Files	This series consists of required accounting forms filed with the Department of Labor. Included are time study forms related to obtaining permission to employ disabled workers at minimum wage rates, WH226 forms, WH226A forms related to requests for lists of people being paid special minimum wages, and related forms.	Hold files in the current files area ten (10) years, then dispose. Audit must have been released three (3) years prior to disposal.
Ellisville State School	5310	Shift Supervisor Files	This series consists of shift supervisors' schedule logs, call sheets, change/overtime approved forms, missing person's reports and related files.	Hold in the current files area two (2) years, then dispose.

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Ellisville State School	5286	Solicitation Applications Files	This series consists of applications related to employees' requests and approvals for the solicitation of donors or potential donor funds for special programs. Documentation includes name of the employee, date of the request, purpose of the request, and supervisory approval.	Hold in the current files area seven (7) years, then dispose.
Ellisville State School	5210	Special Olympics Files	This series consists of on campus Special Olympics participant client files. Included are applications, entry forms and related files.	Hold in the current files area six (6) years, then dispose. Audit must have been released three (3) years prior to disposal.
North Mississippi Regional Center	3908	Attendance Records	This series consists of attendance sheets and logs listing clients who attended recreational functions. This series documents the client and the date of the recreational participation. It is cut off at the end of the calendar year.	Hold in the current files area two (2) years; then dispose.
North Mississippi Regional Center	3857	Census Reports	This series consists of monthly census reports. The reports document the number of clients on campus, in each cottage, and at home. It is cut off at the end of the calendar year.	Hold in the current files area permanently.
North Mississippi Regional Center	3889	Client Training Data Files	This series consists of plans for the treatment and progress of client's are kept on a daily basis and is used to base decisions on progress. It is cut off at the end of the calendar year.	Hold in the current files area five (5) years; then dispose.

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North Mississippi Regional Center	3878	Clinical Records	This series consists of files related to client nutrition. Included are diet lists compiled monthly progress review for each client, nutritional assessment for individual program plan completed annually for each client, individual program plan for each client, height/weight records for each client, written training program for each client, and twenty-four hour schedule. It is cut off at the end of the calendar year.	Hold in the current files area four (4) years; then dispose.
North Mississippi Regional Center	3872	Diagnostic Services Client Files (HARTPACS)	This series consists of files maintained for clients who have been evaluated by the Diagnostic Services Division. Client files contain an application for services, documentation of client contacts and file activities, photographs, of the client, consent forms, Administrative Screening and rulings, copies of social security card, Medicaid card, and birth certificate. It is cut off at the end of the year.	Hold original or authenticated reproduction permanently.
North Mississippi Regional Center	3861	Division General Correspondence	This series consists of incoming and outgoing correspondence and memoranda located in all divisions of the Center. The volume of records on hand varies by division as well as the annual accumulation rate. It is cut off at the end of the year.	Hold in the current files area three (3) years; then dispose.

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North Mississippi Regional Center	3871	Division Reports	This series consists of monthly and annual reports submitted to the Department of Mental Health documenting client data related to the number served, service days, client demographics, and the progress made. This series is cut off at the end of the calendar year.	Hold in the current files area five (5) years; then dispose.
North Mississippi Regional Center	3901	Fiscal Agent Records	This series consists of records submitted to and received from the fiscal agent. Included are Division of Medicaid 317-Forms, Medicaid number, Medicaid income, and amount paid for the listed period. Also Included are billing rosters provided by the fiscal agent for Medicaid that allows the Center to bill for monthly ICF/MR -intermediate Care Facility. It is cut off at the end of the fiscal year.	Hold in the current files area six (6) years; then dispose. Audit must have been released three (3) years.
North Mississippi Regional Center	3909	Individual Program Plan (IPP)	This series consists of duplicates of individual written program plans for clients, the originals of which are in the Central Records Department. It is cut off at the end of the calendar year.	Hold in the current files area two (2) years; then dispose.
North Mississippi Regional Center	3887	Mississippi Department of Education (MDE) Federal Reports	This series consists of reports completed and submitted to the Department of Education. Included are packets of forms to be completed throughout the year. This series contains demographic and educational statistics. It is cut off at the end of the calendar year.	Hold in the current files area five (5) years; then dispose.

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North Mississippi Regional Center	3877	Nutrition Files	This series consists of files related to nutrition and food. Included are menus, diet orders, school lunch financial records, and physical inventory records related to the monthly inventory of food supply. It is cut off at the end of the calendar year.	Hold in the current files area four (4) years; then dispose.
North Mississippi Regional Center	3870	Office Files	This series consists of general office files. Included are reports from outside agencies and other sister agencies, minimum standard files that document the Center is meeting standards to continue receiving funding through the Department of Mental Health, general correspondence related to seminars and workshops, and presentation information consisting of notes, outlines, and agendas. It is cut off at the end of the calendar year.	Hold in the current files area two (2) years; then dispose.
North Mississippi Regional Center	3902	Personal Account Transaction Files	This series consists of documentation related to client's personal accounts. Included are copies of all field trips, community awareness trips, Social Security and Supplemental Security income deposits, petty cash sheets, refunds, outside employment checks, and other records of withdrawals and deposits. It is cut off at the end of the fiscal year.	Hold in the current files area six (6) years; then dispose. Audit must have been released three (3) years.

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North Mississippi Regional Center	3911	Resident Living Accountability Files	This series consists of files related to staffing accountability. Included are bed check forms, shift coverage, twenty-four hour reports, supervisor logs, and sign in sheets. It is cut off at the end of the calendar year.	Hold in the current files area three (3) years; then dispose.
North Mississippi Regional Center	3858	Statistical Reports	This series consists of various reports containing statistical information. Included are auditor's report, department services tally sheet, client leave calendars, admission/discharge information, and other statistical reports. It is cut off at the end of the calendar year.	Hold in the current files area five (5) years; then dispose.
North Mississippi Regional Center	3896	Test Protocols	This series consists of testing materials used to determine client's intellectual and adaptive functioning levels. Included are various tests used to measure the functioning levels. It is cut off at the end of the calendar year.	Hold in the current files area five (5) years; then dispose.
North Mississippi Regional Center	3867	University Affiliated Program (UAP) Records	The series consists of records related to the student volunteer program with the University of Mississippi. Included are original student applications, transcripts, confidentiality and liability waiver, correspondence with university officials, and scholarship "bank credit" hour documentation. It is cut off at the end of the calendar year.	Hold in the current files area five (5) years; then dispose of inactive files.

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North Mississippi Regional Center	3910	Visitor's Passes	This series consists of passes issued to clients when they leave the Center. Documentation includes the client's name, their cottage, address and phone number, estimated date of departure and return, and who approved the departure. It is cut off at the end of the calendar year.	Hold in the current files area five (5) years; then dispose.
North Mississippi Regional Center	3905	Volunteer Records	This series consists of index cards related to people who volunteer at the Center. The index cards document the volunteer, when they started and stopped as a volunteer, and documents related to the performance of the volunteer. Also Included are criminal background checks. It is cut off at the	Hold in the current files area one (1) year after the individual leaves volunteer service; then dispose.
Professional Licensure and Certification	5359	Renewal Files	This series consists of reports and correspondence generated to administer and track renewal of DMH professional credentials. Included are lists of individuals who need to renew, individuals who have fee exemptions, lists of renewed individuals, lists of lapsed individuals, renewal instructions, copies of the renewal packets, and renewal inservice/training audit records.	Hold in current files area four (4) years, then dispose. Audit must have been released three (3) years.