

## Records Retention Schedule Including

### Management, Storage and Destruction of Health Records

<b>Title:</b>	Records Retention Schedule – including Management, Storage and Destruction of Health Records
<b>Procedural document Type:</b>	Policy
<b>Reference:</b>	CL – 037 V1 -
<b>Version:</b>	Version
<b>Approved &amp; Ratified by:</b>	Clinical Governance
<b>Date Approved:</b>	19 <sup>th</sup> March 2019
<b>Name or originator/author:</b>	Information Governance Officer
<b>Name of responsible team:</b>	Information Governance
<b>Review Frequency:</b>	Every three years or when changes in legislation occur
<b>Review Date:</b>	March 2022
<b>Target Audience:</b>	All Staff

## Contents

1. <u>Introduction</u> .....	4
2. <u>Responsibilities and Decision Making</u> .....	4
3. <u>Interpretation of the Schedules</u> .....	4
4. <u>FINAL ACTION:</u> .....	5
4.1. <u>Review</u> .....	5
4.2. <u>Transfer/consult a Place of Deposit or the National Archives:</u> .....	5
4.3. <u>Destroy</u> .....	5
5. <u>Retention Periods:</u> .....	6
6. <u>Who Makes the Decision Regarding Disposal and Destruction of Records?</u> ..	6
7. <u>Archives</u> .....	7
8. <u>Health Records Retention Schedule</u> .....	7
<u>TYPE OF HEALTH RECORD</u> .....	8
9. <u>Business and Corporate (Non-Health) Records Retention Schedule</u> .....	21
<u>ADMINISTRATIVE</u> .....	22
<u>ESTATES/ENGINEERING</u> .....	28
<u>FINANCIAL</u> .....	30
<u>INFORMATION MANAGEMENT AND TECHNOLOGY</u> .....	35
<u>PERSONNEL/HUMAN RESOURCES</u> .....	35
<u>PURCHASING/SUPPLIES</u> .....	38
<u>OTHER</u> .....	39
<u>HEALTH &amp; SAFETY</u> .....	40
<u>FUNDRAISING</u> .....	40
<u>Type/subtype of Record</u> .....	41
<u>PR &amp; Communications</u> .....	41
<u>Reference</u> .....	41

## **Please Note the Intention of this Document**

See Introduction

## **Review and Amendment Log**

<b>Version No</b>	<b>Type of</b>	<b>Date</b>	<b>Description of change</b>
Version 1	New	Feb 2019	New document

## **1. Introduction**

This policy sets out the periods for which the various records created within Cornwall Hospice Care should be retained, either due to their ongoing administrative value or as a result of statutory requirement.

The policy provides information and advice about all records commonly found within Cornwall Hospice Care. The retention schedules apply to all the records concerned, irrespective of the format (e.g. paper, databases, e-mails, X-rays, photographs, CD-ROMS) in which they are created or held.

All other organisations patient documentation is returned to the parent organisation at the end of a patient stay.

## **2. Responsibilities and Decision Making**

Records of Cornwall Hospice Care are subject to the Public Records Act 1958, which imposes a statutory duty of care directly upon all individuals who have direct responsibility for any such records.

## **3. Interpretation of the Schedules**

**TYPE OF RECORD:** lists alphabetically records created as part of a particular function. The schedule has grouped together records of major functions found in the Cornwall Hospice Care organisation.

**MINIMUM RETENTION PERIOD:** Records are required to be kept for a certain period due to statutory requirement or because they may be required for administrative purposes during this time. If the organisation decides it needs to keep records longer than recommended, it can vary the period accordingly and record the decision and reason behind that decision on the retention schedule.

Records selected for permanent preservation should be transferred to permanent storage as soon as they reach the retention period specified and before they reach 30 years old. Should the organization wish to keep records more than 30 years, for operational reasons beyond the 30 years they should consult 'The National Archive' for advice.

4. **FINAL ACTION:** At the end of the relevant retention period, one or more of the following actions will apply:
- 4.1. **Review:** records may need to be kept longer than the minimum retention period due to ongoing administrative need. As part of the review, the organisation should have regard to the GDPR which requires that personal data is not kept longer than necessary. If it is decided that the records should be retained for longer than the minimum period (provided that this does not total a period of 30 years or more from creation) the internal retention schedules will require amending accordingly and a further review date set. Otherwise one of the following will apply:
  - 4.2. **Transfer/consult a Place of Deposit or the National Archives:** If the records have no ongoing administrative value but may have long-term historical or research value, or they have some administrative value but are more appropriately held as archives. Such records must be transferred to the organisation's approved 'Place of Deposit'. Where the organisation has no existing relationship with a 'Place of Deposit', the National Archive should be contacted in the first instance. Where it is unsure whether records may have archival value, the National Archive or 'Place of Deposit' with which the organisation has an existing working relationship should be consulted.
  - 4.3. **Destroy:** where the records are no longer required due to statutory requirement or administrative need and they have no long-term historical or research value. In the case of health records, this should be done in consultation with clinicians in the organisation.
  - 4.4. **Iron Mountain:** Secure transfer, storage and appropriate destruction is undertaken by Iron Mountain, an appropriate cross reference list of patient notes remain with CHC. For further information contact Director of Clinical Services.

**NOTE:** Patients can gain a copy of their record by making a subject access request under GDPR, but should not be provided with original record (even if it has reached the end of the recommended retention period and is due for destruction) unless the permission of the Lord Chancellor has been obtained in accordance with s.3 (6) of Public Records Act. More information can be obtained from the National Archives.

## **5. Retention Periods:**

Records should not be kept for longer than 30 years; however the Public Records Act provides for records which are still in current use to be legally retained for longer than 30 years (e.g. Control of Substances Hazardous to Health Regulations). The minimum retention period should be calculated from the beginning of the year after the last date on the record e.g. a file where the first entry is February 2011 and last is September 2014 for which the retention period is seven years, should be kept in its entirety at least until the end of 2021.

Cornwall Hospice Care should not apply to any records a shorter retention period than the minimum set out in this Policy, but there may be circumstances in which they need to apply a longer retention period. Any decision to extend must ensure the retention period does not exceed 30 years unless prior approval has been obtained via the National Archive.

In respect of records containing personal data as defined by the GDPR, consideration should be given to the principle that personal data processed for purpose shall not be kept for longer than is necessary for that purpose.

## **6. Who Makes the Decision Regarding Disposal and Destruction of Records?**

Principle options: To dispose (passing on to another organisation) or destroy. Staff in the operational area that uses the records will usually be the decision makers.

Operational managers are responsible for making sure all records are periodically and routinely reviewed to determine what can be disposed or destroyed, in the light of local and national guidance.

In respect of health records, recommendation states that a multi-disciplinary Health Records Committee and/or Health Records User Group should be established to provide advice on local policy. Input from local healthcare professionals should be a key element of any records management strategy.

Once the appropriate minimum period has expired, the need to retain records further for local use should be reviewed periodically. Due to the sensitive and confidential nature of such records and the prerequisite to ensure that decisions on retention balance the interests of professional staff, including any research in which they may be engaged, and the resources available for storage, it is recommended that the views of the profession's local representatives should be obtained.

It is not possible to list every type and category in the retention schedule. Where a type is not listed Cornwall Hospice Care managers should consider how other organisations manage these record types and should carry out a risk assessment of the pros and cons of destroying the record or maintaining it for a prolonged period in order to decide how best to manage the record.

## **7. Archives**

It is a legal requirement that Cornwall Hospice Care records which have been selected as archives should be held in a repository that has been approved for the purpose by the National Archives.

## **8. Health Records Retention Schedule**

This retention schedule details a 'Retention Period' for each type of health record. Records (whatever the media) may be retained for longer than the minimum period. However, records should not ordinarily be retained for more than 30 years. Where a retention period longer than 30 years is required (e.g. to be preserved for historical purposes) or any pre-1948 records, the National Archive should be consulted. Records containing personal information are subject to the GDPR and the Data Protection Act 2018.

The following types of records are covered by this retention schedule (regardless of the media on which they are held, including paper, electronic, images and sound and including all records of NHS patients treated on behalf of the NHS)

- Patient health records, (electronic or paper-based, and concerning all specialties, including GP medical records)
- X-ray and imaging reports, output and images.
- Photographs, slides and other images.
- Microform (i.e. microfiche/microfilm) audio and video tapes, cassettes, CD –ROMs)
- E-mails
- Computerised records
- Scanned documents



**Cornwall Hospice Care**  
Caring for our community

Mount Edgumbe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

TYPE OF HEALTH RECORD	MINIMUM RETENTION PERIOD	FINAL ACTION
Adult health records not covered by any other section in this schedule	10 years	Basic health and social care retention period - check for any other involvements that could extend the retention. All must be reviewed prior to destruction taking into account any serious incident retentions. This includes medical illustration records such as X-rays and scans as well as video and other formats.
Record of long term illness or an illness that may reoccur	30 Years or 10 years after the patient has died	Necessary for continuity of clinical care. The primary record of the illness and course of treatment must be kept of a patient where the illness may reoccur or is a life long illness.
Admission books (where they exist in paper format)	8 years after the last entry	Likely to have archival value See para 4 'Final Action'
Ambulance records patient identifiable component (including paramedic records made on behalf of Ambulance Service)	10 years (applies to All Ambulance Clinical Records) NB where a patient is transferred to the care of another NHS organisation all relevant clinical information must be transferred to the patient's health record held at that organisation)	Destroy under confidential conditions
Audit Trails (Electronic Health Records)	Organisations are advised to retain all audit trails until further notice	Destroy under confidential conditions
Blood transfusion records (See pathology records)		



# Cornwall Hospice Care

Caring for our community

Mount Edgcombe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

TYPE OF HEALTH RECORD	MINIMUM RETENTION PERIOD	FINAL ACTION
Body release forms	2 years	Destroy under confidential conditions
Care records-compiled by employees of Cornwall Hospice Care (including information on an individual's educational status, care needs, etc.)	Retain for the period of time appropriate to the patient/speciality 20 years after the last entry in the record or 10 years after the patient's death if patient died whilst In the care of the organisation.	Destroy under confidential conditions
Chaplaincy records	2 years	Likely to have archival value See para 4 'Final Action'
Clinical audit records	5 years	Destroy under confidential conditions
Complementary Therapy records	Retain for the period of time appropriate to the patient/speciality. 20 years after the last entry in the record or 10 years after the patient's death if patient died whilst in the care of the organisation	Destroy under confidential conditions
Controlled drug documentation (Moved from Pharmacy Records)	Requisitions – 2 years Registers and CDRBs – 2 years from last entry Extemporaneous preparation worksheets – 13 years Aseptic worksheets (adult) 13 years External orders and delivery notes – 2 years Prescriptions (inpatients) – 2 years Prescriptions (outpatients) – 2 years Destruction of CD's – 7 years Future Regulations may increase the period of time for storage of records. Please refer to Department of Health <a href="http://www.dh.gov.uk/en/index.htm">http://www.dh.gov.uk/en/index.htm</a> and Royal Pharmaceutical Society of Great Britain <a href="http://www.rpsgb.org.uk/">http://www.rpsgb.org.uk/</a> websites for up-to-date information	Destroy under confidential conditions



**Cornwall Hospice Care**  
Caring for our community

Mount Edgcombe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

<b>TYPE OF HEALTH RECORD</b>	<b>MINIMUM RETENTION PERIOD</b>	<b>FINAL ACTION</b>
Counselling records	20 years after the last entry in the record or 10 years after the patient's death if patient dies whilst in the care of the organisation	See para 4 'Final Action'
Creutzfeldt-Jakob Disease (hospital, hospice and GP)	30 years from date of diagnosis, including deceased patients	See para 4 'Final Action'
Death – Cause of Certificate counterfoils	2 years	Destroy under confidential conditions
Death registers – i.e. register of deaths kept by the hospice, where they exist in paper format	Lists sent to GRO on a monthly basis. Retain for 2 years Death registers prior to lists sent to GRO – offer to Place of Deposit	Likely to have archival value See para 4 'Final Action'
Diagnostic Image Data (for diagnostic imaging undertaken in the private sector under contract to the NHS or private providers treating patients on behalf of the NHS/Hospice)	Retain for the life of the National Diagnostic Imaging Services Contract, then return data to NHS after which the retention period in this retention schedule will apply	
Diaries – health visitors, district nurses and Allied Health Professionals	2 years after end of year to which diary relates. Patient specific information should be transferred to the patient record. Any notes made in the diary as an 'aide memoire' must also be transferred to the patient record as soon as possible	Destroy under confidential conditions
Dietetic and nutrition	Retain for the period of time appropriate to the patient/speciality 20 years after the last entry in the record or 10 years after the patient's death if patient dies whilst in the care of the organisation	Destroy under confidential conditions
Discharge books (where they exist in paper format)	8 years after the last entry	Likely to have archival value See para 4 'Final Action'



**Cornwall Hospice Care**  
Caring for our community

Mount Edgcombe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

TYPE OF HEALTH RECORD	MINIMUM RETENTION PERIOD	FINAL ACTION
Forensic medicine records (including pathology, toxicology, haematology, post mortems forming part of the Coroner's report, and human tissue kept as part of the forensic record)	For post-mortem records which form part of the Coroner's report, approval should be sought from the coroner for a copy of the report to be incorporated in the patient's notes, which should be kept in line with the speciality and then reviewed.  All other records retain for 30 years	See para 4 'Final Action'
Hospice acquired infection records	6 years	Destroy under confidential conditions
Hospice records (i.e. other non – specific, secondary care records that are not listed elsewhere in this schedule)	10 years after conclusion of treatment or death	Destroy under confidential conditions
Lymphoedema records	Retain for the period of time appropriate to the patient/speciality. 20 years after the last entry in the record or 10 years after the patient's death if patient died whilst in the care of the organisation	Destroy under confidential conditions
Medical illustrations	Retain for the period of time appropriate to the patient speciality 20 years after the last entry in the record or 10 years after the patient's death if patient died whilst in the care of the organisation	Destroy under confidential conditions
Mortuary registers (where they exist in paper format)	10 years	See para 4 'Final Action'
Notifiable diseases book	6 years	Destroy under confidential conditions
Occupational health records (staff)	3 years after termination of employment unless litigation ensues	Destroy under confidential conditions



**Cornwall Hospice Care**  
Caring for our community

Mount Edgcumbe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

<b>TYPE OF HEALTH RECORD</b>	<b>MINIMUM RETENTION PERIOD</b>	<b>FINAL ACTION</b>
Occupational therapy records	Retain for the period of time appropriate to the patient/speciality 20 years after the last entry in the record or 10 years after the patient's death if patient dies whilst in the care of the organisation	Destroy under confidential conditions
Outpatient lists (where they exist in paper format)	2 years after the year to which they relate	Destroy under confidential conditions
Pathology records Documents, electronic and paper records		Destroy under confidential conditions
Accreditation documents: records of inspections	10 years or until superseded	Destroy under confidential conditions
Blood gas results	Retain for the period of time appropriate to the patient/speciality 20 years after the last entry in the record or 10 years after the patient's death if patient died whilst in the care of the organisation	
Bound copies of reports/records if made	30 years	
Equipment/instruments maintenance logs, records of service inspections	Lifetime of equipment	
Photographic records	30 years where images present the primary source of information for the diagnostic process	
Records of telephoned reports	2 calendar years	
Reports, copies	6 months	
Post mortem reports	Held in patient's health record for 10 years after the patient's death	



**Cornwall Hospice Care**  
Caring for our community

Mount Edgcumbe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

TYPE OF HEALTH RECORD	MINIMUM RETENTION PERIOD	FINAL ACTION
Request forms that are not a unique record	1 week after report received by requestor	
Request forms that contain clinical information not readily available in the health record	30 years	
Standard operating procedures (current and old)	30 years Scanned copies of previous versions of SOP's will be archived on the intranet.	
Serum following needlestick injury or hazardous exposure	2 years	
Whole blood samples for full blood count	24 hours	
Autopsy reports, specimens, archive material and other where the deceased has been the subject of a Coroner's autopsy	These are Coroner's records – copies may only be lodged on the health record with the Coroner's permission	
Blood for grouping, anti-body screening and saving and/or cross matching	1 week at 4 C	
Refrigeration and freezer charts	11 years	
Request forms for grouping, antibody screening and cross matching	1 month	



# Cornwall Hospice Care

Caring for our community

Mount Edgumbe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

TYPE OF HEALTH RECORD	MINIMUM RETENTION PERIOD	FINAL ACTION
	Results of grouping, antibody screening and other blood transfusion-related tests	30 years to allow full traceability of all blood products used
Pharmacy records	Recommendations for the retention of pharmacy records <a href="http://www.pjonline.com/news/recommendations">http://www.pjonline.com/news/recommendations</a> for the retention of pharmacy records	
Prescriptions Chemotherapy	2 years after last treatment	
TTO's	2 years	
Parenteral nutrition	2 years (original valid prescriptions should be kept in patient's notes)	
Worksheets Raw material request and control forms	At least 5 years (part of batch record, so product liability issues apply)	
Resuscitation box	1 year after expiry of the longest dated item	
Chemotherapy, aseptic's worksheets, parenteral nutrition, production batch records	5 years (product liability extends to 11 years after expiry)	
Quality Assurance Environmental monitoring results	1 year after expiry date of products As electronic record in perpetuity	
Equipment validation	Lifetime of equipment	
Quality Control documentation Certificate of analysis	5 years or 1 year after expiry of batch (whichever is longer)	



# Cornwall Hospice Care

Caring for our community

Mount Edgcumbe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

TYPE OF HEALTH RECORD	MINIMUM RETENTION PERIOD	FINAL ACTION
Refrigerator temperature	1 year (Refrigerator records to be retained for the life of any product stored therein, particularly vaccines)	
Standard Operation Procedures	30 years As electronic record – in perpetuity	
Orders Invoices	6 years	
Order and delivery notes, requisition sheets, old order books	2 years Current financial year plus one	
Picking tickets/delivery notes	3 months i.e. a “reasonable period” – for verification of order only)	
Ward pharmacy requests	1 year (Record of what was requested by ward pharmacist- unlikely benefit after 12 months)	
Photographs (where the photograph refers to a particular patient it should be treated as part of the health record) NB In the context of the Code of Practice a ‘photograph is a print taken with a camera and retained in the patient record	Retain for the period of time appropriate to the patient/speciality 20 years after the last entry in the record or 10 years after the patient’s death if patient died while in the care of the organisation.  Unless there is a clinical reason for retaining the digital image and a print is placed on the patients record, there is no requirement to retain the digital image	Destroy under confidential conditions
Physiotherapy records	Retain for the period of time appropriate to the patient/speciality. 20 years after the last entry in the record or 10 years after the patient’s death if patient died whilst in the care of the organisation	Destroy under confidential conditions



**Cornwall Hospice Care**  
Caring for our community

Mount Edgumbe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

TYPE OF HEALTH RECORD	MINIMUM RETENTION PERIOD	FINAL ACTION
Podiatry records	Retain for the period of time appropriate to the patient/speciality 20 years after the last entry in the record or 10 years after the patient's death if patient died whilst in the care of the organisation	Destroy under confidential conditions
Post mortem records (see Pathology records)		
Post mortem registers (where they exist in paper format)	30 years	Likely to have archival value See para 4 'Final Action'
Psychology records	20 years or 10 years after death if patient died whilst in the care of the organisation	See para 4 'Final Action'
Records/documents related to any litigation	As advised by the organisation's legal advisor. All records to be reviewed. Normal review 10 years after the file is closed	See para 4 'Final Action'
Records of destruction of individual health records (case notes) and other health-related records contained in this retention schedule (in manual or computer format)	Permanently	See para 4 'Final Action'
Referral letters (for patients who are treated by the organisation to which they were referred)	Referral letters should be filed in the patient/client service user's health record, which contains the record of treatment and/or care received for the condition for which the referral was made. This will ensure that the patient record is a complete record. These records should then be retained for the period of time appropriate to the patient/speciality. 20 years after the last entry in the record or 10 years after the patient's death if patient died whilst in the care of the organisation	Destroy under confidential conditions



**Cornwall Hospice Care**  
Caring for our community

Mount Edgcumbe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

TYPE OF HEALTH RECORD	MINIMUM RETENTION PERIOD	FINAL ACTION
Referral letters for clients referred to health or care services but not accepted	<p>Where there is a letter or correspondence detailing the reasons for non-acceptance that goes to the organisation that has referred the client, so the information is also held elsewhere. Retain for 2 years after the decision is made.</p> <p>Where there is no letter or correspondence detailing the reasons for non-acceptance that goes to the organisation that has referred the client. Retain for the period of time appropriate to the patient/speciality 20 years after the last entry in the record or 10 years after the patient's death if patient died whilst in the care of the organisation.</p>	
Referral letters (to PCT clinical service e.g. ECG) where the results are sent back to GP's	Referrals to the Clinical Assessment Service (who deal with referrals to the therapy services), where the patient never followed up the initial referral from the G.P. and have no clinical or patient history with that service. Where the GP has been informed that the patient failed to attend and if all the information held in these files is non-clinical and is also held electronically on a computer system or held elsewhere, the referrals can be destroyed.	Destroy under confidential conditions
Referral letters – where the appointment was cancelled by the patient before the referral letter was included in the patient record (i.e. before the clinic preparation process)	Where a letter is sent to the referring clinician detailing the reason(s) for the patient not attending for their appointment that goes to the clinician that referred the patient/client. Retain for the period of time appropriate to the patient/speciality 20 years after the last entry in the record or 10 years after the patient's death if patient died whilst in the care of the organisation.	Destroy under confidential conditions
Risk Assessment Records	Retain the latest risk assessment until a new one replaces it.	



**Cornwall Hospice Care**  
Caring for our community

Mount Edgcombe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

TYPE OF HEALTH RECORD	MINIMUM RETENTION PERIOD	FINAL ACTION
Scanned records relating to patient care	<p>Retain for the period of time appropriate to the patient/speciality 20 years after the last entry in the record or 10 years after the patient's death if patient died whilst in the care of the organisation.</p> <p>NB Providing the scanning process and procedures are compliant with BSI's BIP:0008 – Code of Practice for Legal Admissibility and Evidential Weight of Information Stored Electronically once the case notes have been scanned the paper records can be destroyed under confidential conditions.</p>	Destroy under confidential conditions
Speech and language therapy records	Retain for the period of time appropriate to the patient/speciality 20 years after the last entry in the record or 10 years after the patient's death if patient died whilst in the care of the organisation	Destroy under confidential conditions
Suicide – notes of patients having committed suicide	10 years	See para 4 'Final Action'
Ultrasound records (e.g. vascular)	Retain for the period of time appropriate to the patient/speciality 20 years after the last entry in the record or 10 years after the patient's death if patient died whilst in the care of the organisation	Destroy under confidential conditions



**Cornwall Hospice Care**  
Caring for our community

Mount Edgumbe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

TYPE OF HEALTH RECORD	MINIMUM RETENTION PERIOD	FINAL ACTION
<p>Video records/voice recordings relating to patient care/video records/video conferencing records related to patient care/DVD records related to patient care includes:</p> <p>Tele-medicine records Out of Hours records NHS Direct records</p>	<p>10 years subject to the following exceptions or where there is a specific statutory obligation to retain records for longer periods:</p> <p><b>Children and young people</b> Records must be kept until the patient's 25<sup>th</sup> birthday or if the patient was 17 at the conclusion of treatment, until their 26<sup>th</sup> birthday or until 10 years after the patient's death if sooner.</p> <p><b>Cancer patients:</b> Records should be kept until 10 years after the conclusion of treatment, especially if surgery was involved. The Royal College of Radiologists has recommended that such records be kept permanently where chemotherapy and/or radiotherapy were given.</p>	<p>The teaching and historical value of such recordings should be considered, especially where innovative procedures or unusual conditions are involved. Video/videoconferencing records should be either permanently archived or permanently destroyed by shredding or incineration (having due regard to the need to maintain patient confidentiality).</p>
<p>Vulnerable Adults (records for)</p>	<p>Where a patient/client/service user is transferred from the care of one NHS/Hospice or social care organisation to another, all relevant information must be transferred to the patient's health or social care record held at the receiving organisation and they should then be retained for the period of time appropriate to the speciality.</p> <p>Where a patient/client/service user is assessed by a health or social care professional including ambulance personnel and is identified as a vulnerable adult the professional should follow the protocols for dealing with vulnerable adults in their organisation.</p>	<p>Destroy under confidential conditions</p>



**Cornwall Hospice Care**  
Caring for our community

Mount Edgumbe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

TYPE OF HEALTH RECORD	MINIMUM RETENTION PERIOD	FINAL ACTION
Ward registers, including daily bed returns (where they exist in paper format)	2 years after the year to which they relate	Likely to have archival value See para 4 'Final Action'
X-ray films (including other image formats for all imaging modalities/diagnostics)	<p>General Patient Records – 10 years after conclusion of treatment</p> <p>Litigation – Records should be reviewed 10 years after the file is closed. Once litigation has been notified (or a formal complaint received) images should be stored until 10 years after the file has been closed.</p>	Destroy under confidential conditions
	Oncology – see Oncology Records	
X-ray Referral/Request Cards	10 years providing there is a record in the patient's health record that a referral/request was made for an x-ray	Destroy under confidential conditions
X-ray registers (where they exist in paper format)	30 Years	Likely to have archival value. See para 4 'Final Action'
X-ray reports (including reports for all imaging modalities)	To be considered as a permanent part of the patient record and should be retained for the appropriate period of time.	

## 9. Business and Corporate (Non-Health) Records Retention Schedule

This retention schedule details a Minimum Retention Period for each type of non-health record. Records (whatever the media) may be retained for longer than the minimum period. The National archives (See para 4 below) should be consulted where a longer period than 30 years is required or for any pre-1948 records. Cornwall Hospice Care should also remember that records containing personal information are subject to the GDPR and Data Protection Act 2018.

The following types of record are covered by this retention schedule (regardless of the media on which they are held, including paper, electronic, images and sound)

- Administrative records (including personnel, estates, financial and accounting)
- Records and notes associated with complaint handling
- Photographs, slides and other images (non-clinical)
- Microform (i.e. microfiche/microfilm)
- Audio and video tapes, cassettes, CD-ROMs etc.
- E mails computerised records
- Scanned documents

The schedule is split into the following types of records:

- Administrative (corporate and organisation)
- Biomedical Engineering
- Estates/engineering
- Financial
- Information management and technology
- Other



**Cornwall Hospice Care**  
Caring for our community

Mount Edgcumbe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

- Personnel/human resources
- Purchasing /supplies

Type/subtype of Record	Minimum Retention Period	Final Action
<b>ADMINISTRATIVE (corporate and organisation)</b>		
Accident forms (see also Litigation dossiers)	10 years	Destroy under confidential conditions
Accident register (Reporting of Injuries, Diseases and Dangerous Occurrences register) – see also Incident forms	10 years	Destroy under confidential conditions
Agendas of board meetings, committees, sub-committees (master copies, including associated papers)	30 years	See para 4 'Final Action'
Agendas (other)	2 years	Destroy under confidential conditions
Agreements (see Contracts)		
Annual /corporate reports	3 years	See para 4 'Final Action'
Audit Records (e.g. Organisational Audits, Records Audits, System Audits) – Internal & External in any format (paper, electronic etc.)	2 years from the date of completion of the audit	Destroy under confidential conditions
Business plans, including local delivery plans	20 years	Destroy



# Cornwall Hospice Care

Caring for our community

Mount Edgcumbe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

Type/subtype of Record	Minimum Retention Period	Final Action
Catering forms	6 years	Destroy under confidential conditions
Close circuit TV images	31 days	Erase permanently
Commissioning decisions - Appeal documentation  - Decision documentation	- 6 years from date of appeal decision - 6 years from date of decision	Destroy under confidential conditions
Complaints (see also litigation dossiers) - Correspondence, investigation and outcomes -Returns made to Department of Health	- 8 years from completion of action - Files closed annually and kept for 6 years following closure NB: current policy on the handling of complaints if under review by the Department of Health and further guidance will be issued in due course.	Destroy under confidential conditions
Copyright declaration		
Data Input Forms (where the data/information has been input to a computer system)	2 years	Destroy under confidential conditions
Diaries (office)	1 year after the end of the calendar year to which they refer	Destroy under confidential conditions
Flexi working hours (personal record of hours actually worked)	6 months	Destroy under confidential conditions
Freedom of Information requests	3 years after full disclosure;  10 years if information is redacted or the information requested is not disclosed.	Destroy under confidential conditions
Health and safety documentation	3 years	Destroy under confidential conditions



**Cornwall Hospice Care**  
Caring for our community

Mount Edgcumbe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

Type/subtype of Record	Minimum Retention Period	Final Action
History of organisation or predecessors, its organisation and procedures (e.g. establishment order)	30 years	See para 4 'Final Action'
Hospices services E.g. service that the Hospice provides e.g. catering, hotel services	10 years	Destroy
Incident forms	10 years	Destroy under confidential conditions
Indices (record management)	Registry lists of public records marked for permanent preservation, or containing the record of management of public records – 30 years  File lists and document lists where public records or their management are not covered – 30 years	See para 4 'Final Action'  Destroy under confidential conditions
Litigation dossiers (complaints including accident/incident reports) Records/ documents relating to any form of litigation	10 years  Where a legal action has commenced, keep as advised by legal representatives	Destroy under confidential conditions
Manuals – policy and procedure (administrative and clinical, strategy document)	10 years after life of the system (or superseded) to which the policies or procedures refer	Destroy (policy documents may have archival value – see note 1)
Maps	Lifetime of the organisation	See 'Final Action' note 1
Meetings and minutes papers of major committees and subcommittees (master copies)	30 years	See para 4 'Final Action'



**Cornwall Hospice Care**  
Caring for our community

Mount Edgcombe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

Type/subtype of Record	Minimum Retention Period	Final Action
Meetings and minutes papers (other, including reference copies of major committees)	2 years	Destroy under confidential conditions
Papers of minor or short-lived importance not covered elsewhere, e.g. advertising matter covering letters reminders letters making appointments anonymous or unintelligible letters drafts duplicates of documents known to have been preserved elsewhere (unless they have important minutes on them)	2 years after the settlement of the matter to which they relate	Destroy under confidential conditions
indices and registers compiled for temporary purposes routine reports punched card other documents that have ceased to be of value on settlement of the matter involved		
Patient information leaflets	6 years after the leaflet has been superseded	See para 4 'Final Action'
Patients' property books/registers (property handed in for safekeeping)	6 years after the end of the financial year in which the property was disposed of or 6 years after the register was closed	Destroy under confidential conditions
Patients Surveys (re access to services etc.)	2 years	Destroy under confidential conditions



# Cornwall Hospice Care

Caring for our community

Mount Edgumbe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

Type/subtype of Record	Minimum Retention Period	Final Action
Phone message Books	2 years  NB Any clinical information should be transferred to the patient health record	Destroy under confidential conditions
Press cuttings	1 year	Destroy (where bound volumes exist), see note Para 4 'Final Action'
Press releases	7 years	See para 4 'Final Action'
Project files (over £100,000) on termination, including abandoned or deferred projects	6 years	See para 4 'Final Action'
Project files (less than £100,000) on termination	2 years	Destroy under confidential conditions
Project team files (summary retained)	3 years	Destroy under confidential conditions
Public Consultations e.g. about future provision of services	5 years	Destroy under confidential conditions
Quality assurance records (e.g. Healthcare Commission, Audit Commission, King's Fund)	12 years	Destroy under confidential conditions
Organisational Audit, Investors in People)		
Receipts for registered and recorded mail	2 years following the end of the financial year to which they relate	Destroy under confidential conditions



# Cornwall Hospice Care

Caring for our community

Mount Edgumbe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

Type/subtype of Record	Minimum Retention Period	Final Action
Records documenting the archiving, transfer to public records archive or destruction of records	30 years	See para 4 'Final Action'
Records of custody and transfer of keys	2 years after last entry	Destroy under confidential conditions
Reports (major)	30 years	See para 4 'Final Action'
Requests for access to records, other than Freedom of Information or subject access requests	6 years after last action	Destroy under confidential conditions
Requisitions	18 months	Destroy under confidential conditions
Serious incident files	30 years	See para 4 'Final Action'
Specifications (e.g. equipment, services)	6 years	Destroy under confidential conditions
Statistics (including Korner returns, contact minimum data set, statistical returns to DH patient activity)	3 years from date of submission	Destroy
Time sheets (relating to a Group or Department e.g. Ward where the timesheets are kept as a tool to manage resources, staffing levels)	6 months	Destroy under confidential conditions



**Cornwall Hospice Care**  
Caring for our community

Mount Edgcumbe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

Type/subtype of Record	Minimum Retention Period	Final Action
<b>ESTATES/ENGINEERING</b>		
Buildings and engineering works, including major projects abandoned or deferred – key records (e.g. final accounts, survey, site plans, bills of quantities)	30 years	See para 4 'Final Action'
Buildings and engineering works, including major projects abandoned or deferred – town and country planning matters and all formal contract documents (e.g. executed agreements, conditions of contract specifications, 'as built' record drawings, documents on the appointment and conditions of engagement of private buildings and engineering consultants)	30 years	See para 4 'Final Action'
Buildings – papers relating to occupation of the building (but not health and safety information)	3 years after occupation ceases	Destroy under confidential conditions
Deeds of title	Retain while the organisation has ownership of the building unless a Land Registry certificate has been issued, in which case the deeds should be placed in an archive  If there is no Land Registry certificate, the deeds should pass on with the sale of the building	See para 4 'Final Action'



**Cornwall Hospice Care**  
Caring for our community

Mount Edgumbe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

Type/subtype of Record	Minimum Retention Period	Final Action
Maintenance contracts (routine)	6 years from end of contract	Destroy under confidential conditions
Manuals (operating)	Lifetime of equipment	Review if issues (e.g. HSE are outstanding)
Medical device alerts	Retain until updated or withdrawn (check MHRA website)	Destroy under confidential conditions
Photographs of buildings	30 years	See para 4 'Final Action'
Plans – building (as built)	Lifetime of building	May have historical value – See para 4 'Final Action'
Plans – building (detailed)	Lifetime of building	May have historical value (See para 4 'Final Action')
Plans - engineering	Lifetime of building	See para 4 'Final Action'
Property acquisitions dossiers	30 years	See para 4 'Final Action'
Property disposal dossiers	30 years	See para 4 'Final Action'
Site files	Lifetime of site	See para 4 'Final Action'
Structure plans (organisational charts) i.e. the structure of the building plans	Lifetime of building	See para 4 'Final Action'
Surveys – building and engineering works	Lifetime of building or installation	See para 4 'Final Action'



# Cornwall Hospice Care

Caring for our community

Mount Edgumbe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

Type/subtype of Record	Minimum Retention Period	Final Action
<b>FINANCIAL</b>		
Accounts – annual (final – one set only)	30 years	See para 4 'Final Action'
Accounts – minor records (pass books, paying-in slips, cheque counterfoils, cancelled/discharged cheques (for cheques bearing printed receipts, see Receipts), accounts of petty cash expenditure, travel and subsistence accounts, minor vouchers, duplicate receipt books, income records, laundry lists and receipts)	2 years from completion of audit	Destroy under confidential conditions
Accounts – working papers	3 years from completion of audit	Destroy under confidential conditions
Advice notes (payment)	1½ years	Destroy under confidential conditions
Audit records (internal and external audit) – original documents	2 years from complete audit	Destroy under confidential conditions
Audit reports – internal and external (including management letters, value for money reports and system/final accounts memoranda)	2 years after formal completion by statutory auditor	Destroy under confidential conditions
Bank statements	2 years from completion of audit	Destroy under confidential conditions



**Cornwall Hospice Care**  
Caring for our community

Mount Edgcumbe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

Type/subtype of Record	Minimum Retention Period	Final Action
Banks Automated Clearing System (BACS) records	6 years after year end	Destroy under confidential conditions
Benefactions (records of)	5 years after end of financial year in which the trust monies become finally spent or the gift in kind is accepted. In cases where the Benefaction Endowment Trust fund/capital/interest remains permanent, records should be permanently retained by the organisation	See para 4 'Final Action'
Bills, receipts and cleared cheques	6 years	Destroy under confidential conditions
Budgets (including working papers, reports, virements and journals)	2 years from completion of audit	Destroy under confidential conditions
Capital charges data	2 years from completion of audit	Destroy under confidential conditions
Capital paid invoices (see invoices)		
Cash books	6 years after end of financial year to which they relate	Destroy under confidential conditions
Cash sheets	6 years after end of financial year to which they relate	Destroy under confidential conditions
Contracts - financial	Approval files – 15 years Approved suppliers lists – 11 years	Destroy under confidential conditions
Contracts – non-sealed (property) on termination	6 years after termination of contract	Destroy under confidential conditions



# Cornwall Hospice Care

Caring for our community

Mount Edgumbe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

Type/subtype of Record	Minimum Retention Period	Final Action
Contracts – non-sealed (other) on termination	6 years after termination of contract	Destroy under confidential conditions
Contracts – sealed (and associated records)	Minimum of 15 years, after which they should be reviewed	See para 4'Final Action'
Contractual arrangements with hospices, hospitals or other bodies, including papers relating to financial settlements made under the contract (e.g. waiting list initiative, private finance initiative)	6 years after end of financial year to which they relate	Destroy under confidential conditions
Cost accounts	3 years after end of financial year to which they relate	Destroy under confidential conditions
Creditor payments	3 years after end of financial year to which they relate	Destroy under confidential conditions
Debtor's records - cleared	2 years after completion of audit	Destroy under confidential conditions
Debtors' records – un cleared	6 years from completion of audit	Destroy under confidential conditions
Demands notes	6 years after end of financial year to which they relate	Destroy under confidential conditions
Estimates, including supporting calculations and statistics	3 years after end of financial year to which they relate	Destroy under confidential conditions
Excess fares	2 years after end of financial year to which they relate	Destroy under confidential conditions



# Cornwall Hospice Care

Caring for our community

Mount Edgumbe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

Type/subtype of Record	Minimum Retention Period	Final Action
Expense claims, including travel and subsistence claims, and claims and authorisations	5 years after end of financial year to which they relate	Destroy under confidential conditions
Fraud case files/investigations	6 years	Destroy under confidential conditions
Funding data	6 years after end of financial year to which they relate	Destroy under confidential conditions
General Medical Services Payments	6 years after year end	Destroy under confidential conditions
Invoices	6 years after end of financial year to which they relate	Destroy under confidential conditions
Ledgers, including cash books, ledgers, income and expenditure journals, nominal rolls, non-exchequer funds records (patient monies)	6 years after end of financial year to which they relate	Destroy under confidential conditions
Non-exchequer funds records (i.e. funding received by the organisation that does not directly relate to patient care e.g. charitable funds)	30 years  Company charities are required by company law to keep their accounts and accounting records for at least three years but the Charity Commission recommends that they be kept for at least 6 years. The majority of noncompany charities must keep their accounts and accounting records for 6 years (part VI Charities Act 1993)	Although technically exempt from the Public Records Act, it would be appropriate for authorities to treat these records as if they were not exempt.
Patient Monies (i.e. smaller sums of donated money)	6 years	Destroy under confidential conditions
PAYE records	6 years after termination of employment	Destroy under confidential conditions



**Cornwall Hospice Care**  
Caring for our community

Mount Edgcombe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

Type/subtype of Record	Minimum Retention Period	Final Action
Payments	6 years after year end	Destroy under confidential conditions
Payroll (i.e. List of staff in the pay of the organisation)	6 years after termination of employment	Destroy under confidential conditions For superannuation purposes, organisations may wish to retain such records until the subject reaches benefit age
Receipts	6 years after end of financial year to which they relate	Destroy under confidential conditions
Salaries (see Wages)		
Superannuation accounts	10 years	Destroy under confidential conditions
Superannuation registers	10	Destroy under confidential conditions
Tax forms	6 years	Destroy under confidential conditions
Transport (staff pool car documentation)	3 years unless litigation ensues	Destroy under confidential conditions
Cornwall Hospice Care documents without permanent relevance/not otherwise mentioned	6 years	Destroy under confidential conditions



# Cornwall Hospice Care

Caring for our community

Mount Edgcombe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

Type/subtype of Record	Minimum Retention Period	Final Action
Cornwall Hospice Care organisation administered by Strategic Health Authorities (terms of)	30 years	See para 4 'Final Action'
VAT records	6 years after end of financial year to which they relate	Destroy under confidential conditions
Wages/salary records	10 years after termination of employment	Destroy under confidential conditions

Type/subtype of Record	Minimum Retention Period	Final Action
<b>INFORMATION MANAGEMENT AND TECHNOLOGY</b>		
Documentation relating to computer programmes written in-house	Lifetime of software	Destroy under confidential conditions
Software licences	Lifetime of software	Destroy under confidential conditions

Type/subtype of Record	Minimum Retention Period	Final Action
<b>PERSONNEL/HUMAN RESOURCES</b>		
NB Both medical staff records and agency locums, staff records should be treated as personnel records and retained accordingly.		



# Cornwall Hospice Care

Caring for our community

Mount Edgcombe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

Type/subtype of Record	Minimum Retention Period	Final Action
Consultant (records relating to the recruitment of)	5 years	Destroy under confidential conditions
CVs for non-executive directors (successful applicants)	5 years following term of office	Destroy under confidential conditions
CVs for non-executive directors (unsuccessful applicants)	2 years	Destroy under confidential conditions
Duty rosters i.e. Organisation or departmental rosters, not the ones held on the individual's record	4 years after the year to which they relate	Destroy under confidential conditions
Job advertisements	1 year	Destroy
Job applications (successful)	3 years following termination of employment	Destroy under confidential conditions
Job applications (unsuccessful)	1 year	Destroy under confidential conditions
Job descriptions	3 years	Destroy under confidential conditions
Leavers' dossiers	6 years after individual has left Summary to be retained until individual's 70 <sup>th</sup> birthday or until 6 years after cessation of employment if aged over 70 years at the time.  The summary should contain everything except attendance books, annual leave records, duty rosters, clock cards, time sheets, study leave applications, training plans.	Destroy under confidential conditions See para 4'Final Action'



# Cornwall Hospice Care

Caring for our community

Mount Edgcombe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

Type/subtype of Record	Minimum Retention Period	Final Action
Letters of appointment	6 years after employment has terminated or until 70 <sup>th</sup> birthday, whichever is later	Destroy under confidential conditions
Nurse training records (from hospital-based nurse training schools prior to the introduction of academic-based training)	30 years	See para 4 'Final Action'
Pension Forms (all)	7 years	Destroy under confidential conditions
Personnel/human resources records – major (e.g. personal files, letters of appointment, contracts, references and related correspondence, registration authority forms, training records, equal opportunity monitoring forms (if retained)  NB Includes locum doctors	6 years after individual leaves service, at which time a summary of the file must be kept until the individual's 70 <sup>th</sup> birthday.  Summary to be retained until individual's 70 <sup>th</sup> birthday or until 6 years after cessation of employment if aged over 70 years at the time.  The summary should contain everything except attendance books, annual leave records, duty rosters, clock cards, timesheets, study leave applications, training plans	See para 4 'Final Action'
Personnel/human resources records – minor (e.g. attendance books, annual leave records, duty rosters (i.e. duty rosters held on the individual's record not the organisation or departmental rosters) clock cards. timesheets (relating to individual staff members) NB includes locum doctors	2 years after the year to which they relate	Destroy under confidential conditions
Staff parking permits	3 years	Destroy under confidential conditions



# Cornwall Hospice Care

Caring for our community

Mount Edgcumbe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

Type/subtype of Record	Minimum Retention Period	Final Action
Study leave applications	5 years	Destroy under confidential conditions
Timesheets (for individual members of staff)	2 years after the year to which they relate NB Timesheets (for all individuals including locum doctors) held on the personnel record are minor records – retain for 2 years	Destroy under confidential conditions
Training plans	2 years	Destroy under confidential conditions

Type/subtype of Record	Minimum Retention Period	Final Action
<b>PURCHASING/SUPPLIES</b>		
Approval files (contracts)	6 years after the end of the year the contract expired	Destroy under confidential conditions
Approved suppliers lists	11 years	Destroy under confidential conditions
Delivery notes	2 years after end of financial year to which they relate	Destroy under confidential conditions
Products (liability)	11 years	Destroy under confidential conditions
Stock control reports	18 months	Destroy under confidential conditions
Stores records – major (e.g. stores ledgers)	6 years	Destroy under confidential conditions



# Cornwall Hospice Care

Caring for our community

Mount Edgumbe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

Stores records – minor (e.g. requisitions, issue notes, transfer vouchers, goods received books)	18 months	Destroy under confidential conditions
Supplies records – minor (e.g. invitations to tender and inadmissible tenders, routine papers relating to catering and demands for furniture, equipment, stationery and other supplies)	18 months	Destroy under confidential conditions
Tenders (successful)	Tender period plus 6 year limitation period	Destroy under confidential conditions
Tenders (unsuccessful)	6 years	Destroy under confidential conditions

Type/subtype of Record	Minimum Retention Period	Final Action
<b>OTHER</b>		
Chaplaincy records	2 years	May have archival value- See para 4 'Final Action'
Contractor records e.g. Correspondence relating to pharmacies supplying oxygen	7 years	Destroy under confidential conditions
Research and development (organisation) i.e. All the organisation's records associated with research and development and not individual trial records or information on patient	30 years	See para 4 'Final Action'



# Cornwall Hospice Care

Caring for our community

Mount Edgcumbe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

Type/subtype of Record	Minimum Retention Period	Final Action
<b>HEALTH &amp; SAFETY</b>		
Accident forms The FS203 standard form	3 years for staff and public over 18 (this is to allow the time for claims to be made).	Destroy under confidential conditions
Accident forms The FS203 standard form	Children. Form needs to be retained until they are 21. They have three years to mount a claim after turning 18. Even if their parents had claimed previously on their behalf they can initiate a claim as an adult.	Destroy under confidential conditions
Risk Assessment (Health and Safety)	Minimum review 2 years, retain previous document as proof/reference	Destroy under confidential conditions
Health surveillance related to occupational diseases	As a general rule, individual health records should be kept for at least 40 years from the date of the last entry. However, some regulations may require you to keep them for much longer as ill-health effects might not emerge for a very long period after exposure. (It is good practice to offer individual employees a copy of their health record when they leave your employment).	Destroy under confidential conditions
Legionella Risk Assessment	Review every two years, retain previous as reference and proof.	
Asbestos Management reports.	Annually reviewed keep last one for proof /reference	

Type/subtype of Record	Minimum Retention Period	Final Action
<b>FUNDRAISING</b>		
Personal data held within the Raisers Edge database i.e. supporters database	15 years after the last interaction with the individual.	Destroy under confidential conditions
Records relating a participants personal and other details concerning their participation in an	8 years after last contact with participant	Confidential deletion/destruction of the records.



# Cornwall Hospice Care

Caring for our community

Mount Edgumbe Hospice

St. Julia's Hospice

Registered Charity No. 1113140

event supported or organised by CHC.		
Lottery records	Accounting records must be retained for a minimum of three years from the date of any lottery to which they relate and they must be made available for inspection by the (Gambling) Commission on request. These records must contain, in respect of each lottery, details of the total proceeds of each lottery, the expenses of the lottery, and the number of sold and unsold tickets. CHC retain Lottery records in line with Finance retention requirements i.e. 6 years.	Confidential deletion/destruction of the records.

Type/subtype of Record	Minimum Retention Period	Final Action
<b>PR &amp; Communications</b>		
Records relating to receiving communications about the activities of the Charity, including the annual information sheet.	These records will be maintained in full for the period of time that communications are maintained, when consent is withdrawn, the person leaves the area or dies - basic details will still be maintained to ensure that further communications are not inadvertently sent.	Confidential deletion/destruction of the records.

## Reference

Department of Health

<https://digital.nhs.uk/media/1158/Records-Management-Code-of-Practice-for-Health-and-Social-Care-2016/pdf/Records-management-COP-HSC-2016>