

Last Updated

Sep-17

Review Date

Jun-18

Adult Social Care - Records Retention Schedule

Function Description	Record Code	Main File/Class Title	Manual/ Electronic	Destroy/ Review	Retention Period (Years)			Notes	Vital Record
					In Office	Archived	Total		
Process involving assessing and providing support or services for adults, both over and under the age of 65	AFA01X	Adult Case File	Electronic	Destroy	1 year after date of last contact	2 years	3 years	Or 1 year after date deceased. Continuing health care records to be transferred once deceased.	✓
	CHC01X	Adult Case File Continuing Health Care		Destroy	1 year after date of death	7 years	8 years from date of death	Only to be transferred once deceased.	✓
	CHC02X	Adult Case File Continuing Health Care, Mental Health		Destroy	1 year after date of death	29 years	30 years from date of death	Only to be transferred once deceased. NHS Records Management Code of Practice	✓
	SAF01X	Safeguarding Adults, Individual Case Files		Destroy	Current & previous year	4 years	5 years		✓
Process involving assessing and providing support or services for adults with long term conditions	AHT01X	Home Improvement Agency Case File		Destroy	4 years	6 years	10 years from close date		✓
	N/A	CVI (Formerly known as BD8)		Destroy	100 years	N/A	100 years Or 1 year after date deceased.	Records of examination to certify a person as blind or partially sighted. Held in office	✓
	ADS03X	Occupational Therapy Client File		Destroy	3 years	4 years	7 years	Or 1 year after date deceased	✓
	AIL02X	Wheelchair Services Case File		Destroy	3 years	7 years	10 years Or 1 year after date deceased		✓
	BCB01X	Blue Car Badge Application Forms		Destroy	Current Year	3 years	3 years	Disabled Persons (Badges for Motor Vehicles) (England) Regs 2000	*