

## RETENTION SCHEDULE

**NB** These retention periods do not fall below those recommended in HSC 1999/053 but, in some instances, are over and above the minimum requirements reflecting recommendations given. This document is a working document that will need to be regularly reviewed.

## Suggested breakdown of Departments/Services minimum requirements for those records indicated

SERVICE/DEPARTMENT	RECORD TYPE/SUB TYPE	RETENTION PERIOD (Years)	NOTES
<b>General</b>	Computerised records		The recommended minimum retention periods apply to both paper and computerised records, though extra care needs to be taken to prevent corruption or deterioration of the data. Recording/migration of data will also need to be considered as equipment and software become obsolete. For guidance, see the Public Record Office guidance, <u>Management and Appraisal of Electronic Records (1998)</u>
	Day Files	1	
	Delivery Notes	1.5	
<b>Clinical Diaries not mentioned but very important and must be considered with Health Records</b>	Diaries- office - on completion	1	
	Inventories of items having a life of less than 5 years.	1.5	
<b>Also under Clinical Governance and Health Records</b>	Photographs		These documents must be considered for permanent preservation but the advice of the chief archivist of an appropriate place of deposit is to be obtained before any final decision is made. *
	Press Cuttings	2 or longer, at the discretion of the Trust Head of Communications	
	Quality Assurance Records	12	
	Record of custody and transfer of keys	1.5	
	Research * Development (Scientific, Technological and Medical)		These documents must be considered for permanent preservation but the advice of the chief archivist of an appropriate place of deposit is to be obtained before any final decision is made. *
	Study leave Applications	1.5	

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	Subject Files		These documents must be considered for permanent preservation but the advice of the chief archivist of an appropriate place of deposit is to be obtained before any final decision is made. *
<b>Clinical Audit</b>	Audit data	On completion of project, forms destroyed or returned to clinician/clinical group for retention as required	
	Audit tools (e.g. Data collection forms and questionnaires)	5	Papers will be reviewed after 5 years and a decision taken as to further retention or disposal
<b>Clinical Governance</b>	Complaints <b>also under Corporate</b>	10	
		Photographs	These documents must be considered for permanent preservation but the advice of the chief archivist of an appropriate place of deposit is to be obtained before any final decision is made. *
	Quality Assurance Records	12	
	Research and Development (Scientific, Technological and Medical)		These documents must be considered for permanent preservation but the advice of the chief archivist of an appropriate place of deposit is to be obtained before any final decision is made. *
<b>Risk Management</b>	<ul style="list-style-type: none"> <li>Clinical</li> </ul>	<ul style="list-style-type: none"> <li>Adverse Clinical Incidents</li> <li>Serious Incident Reviews</li> </ul>	To be confirmed by the Clinical Governance Steering Committee/Governance & Risk Management Committee
	<ul style="list-style-type: none"> <li>Non Clinical</li> </ul>	<ul style="list-style-type: none"> <li>Accident Forms</li> <li>Riddor Reportable Incidents</li> </ul>	
<b>Contracts</b>	Contracts - non sealed (property) on termination	6	The Limitation Act, 1980
	Contracts - non sealed (other) on termination	6	The Limitation Act, 1980

SERVICE/DEPARTMENT	RECORD TYPE/SUB TYPE	RETENTION PERIOD (Years)	NOTES
	Contracts sealed	Contracts under seal and associated records should be kept for a minimum of 15 years	These documents must be considered for permanent preservation but the advice of the chief archivist of an appropriate place of deposit is to be obtained before any final decision is made. *
	Agreements	As per type of contract?	
	Approval Files (Contracts)		These documents must be considered for permanent preservation but the advice of the chief archivist of an appropriate place of deposit is to be obtained before any final decision is made. *
<b>Corporate</b>	Accident forms	10	Where legal action has been commenced, keep as advised by legal representatives
	Agendas (Master copies) ?? <b>Just Board</b>	Permanent	
	Complaints	10	
	Contracts - Non sealed (Property) on termination	6	The Limitation Act 1980
	Contracts - Non sealed (other) on termination	6	The Limitation Act 1980
	Contracts - sealed	Contracts under seal and associated records should be kept for a <b>minimum</b> of 15 years	These documents must be considered for permanent preservation but the advice of the chief archivist of an appropriate place of deposit is to be obtained before any final decision is made. *
	History of Trust or Predecessors, its organisation and procedures/ ? <b>Business Cases</b>		These documents must be considered for permanent preservation but the advice of the chief archivist of an appropriate place of deposit is to be obtained before any final decision is made. *
	History of Hospitals		These documents must be considered for permanent preservation but the advice of the chief archivist of an appropriate place of deposit is to be obtained before any final decision is made. *
	Litigation Dossiers (complaints including accident reports)	10 years from formal disposal of a claim	Where a legal action has been commenced, keep as advised by legal representatives.

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<b>Clarification will be required by the Board as to which meetings this will refer to in the Trust</b>	<b>Master Copy - signed</b> Meeting Papers - committees, sub-committees, predecessors (Master copies)	Permanent	
	Minutes of the Trust or major committees and sub-committees	Permanent	
	Minutes - reference copies	1	
	Serious Incident Files	These documents must be considered for permanent preservation but the advice of the chief archivist of an appropriate place of deposit is to be obtained before any final decision is made. *	
<b>Estates</b>	Approved Suppliers Lists	11	Consumer Protection Act 1987
	Building and engineering works, inclusive of major projects abandoned or deferred - key records, (e.g. Final accounts, surveys, site plans, bills of quantities)	Permanent	
	Building and engineering works, inclusive of 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 and documents on the appointment and conditions of engagement of private buildings and engineering consultants.	These documents must be considered for permanent preservation but the advice of the chief archivist of an appropriate place of deposit is to be obtained before any final decision is made. *	The general principle to be followed in regard to these records is that they should be preserved for the life of the buildings and installations to which they refer.
	Buildings - papers relating to occupation (but not Health 7 Safety information)	3	After occupation ceases. Construction Design Management Regulations 1994

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	Contracts - Non sealed (Property) on termination	6	The Limitation Act 1980
	Contracts - Non sealed (other) on termination	6	The Limitation Act 1980
	Contracts - sealed	Contracts under seal and associated records should be kept for a <b>minimum</b> of 15 years	These documents must be considered for permanent preservation but the advice of the chief archivist of an appropriate place of deposit is to be obtained before any final decision is made. *
	Deeds of Title	Permanent	
	Drawings	The general principle to be followed in regard to these records is that they should be preserved for the life of the buildings and instalations to which they refer.	These documents must be considered for permanent preservation but the advice of the chief archivist of an appropriate place of deposit is to be obtained before any final decision is made. *
<b>Estates</b>	Engineering works	Permanent	
	Equipment	11	Consumer Protection Act 1987
	Inspection Reports - e.g. Boilers, lifts etc.	Lifetime	Normally retain for the lifetime of an installation. However, it is necessary to assess whether obligations incurred during the lifetime may not be invoked until afterwards, in which case a judgement must be made. If there is any measurable risk of a liability in respect of installations beyond their operational lives, records of this kind should be retained indefinitely.
	Inventories (not in current use) of items having a life of less than 5 years	1.5	

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	Land Surveys/Registers		These documents must be considered for permanent preservation but the advice of the chief archivist of an appropriate place of deposit is to be obtained before any final decision is made. *
	Manuals	Lifetime	
	Manuals - policy and procedure		These documents must be considered for permanent preservation but the advice of the chief archivist of an appropriate place of deposit is to be obtained before any final decision is made. *
	Maps		These documents must be considered for permanent preservation but the advice of the chief archivist of an appropriate place of deposit is to be obtained before any final decision is made. *
	Maintenance contracts - routine	??6	
	Mortgage documents (acquisition, transfer and disposal)	Permanent	
	Plans - Building (As Built)		These documents must be considered for permanent preservation but the advice of the chief archivist of an appropriate place of deposit is to be obtained before any final decision is made. *
	Plans - Buildings (Detailed)	Lifetime	<b>See</b> Inspection reports
	Plans - Engineering	Lifetime	<b>See</b> Inspection reports
	Products - Liability	11	Consumer Protection Act 1987
	Project Files (under £100,000) on termination - including abandoned or deferred projects	6	
	Project Team Files - summary retained	3	

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	Property Acquisitions Dossiers	Permanent	
	Property Disposal Dossiers	Permanent	
	Site Files	As per Contracts	
	Structure Plans (LA's)	These documents must be considered for permanent preservation but the advice of the chief archivist of an appropriate place of deposit is to be obtained before any final decision is made. *	
	Surveys - building and engineering	These documents must be considered for permanent preservation but the advice of the chief archivist of an appropriate place of deposit is to be obtained before any final decision is made. *	
	Tenders (successful)		See <b>Contracts</b>
	Tenders (unsuccessful)	6	The Limitation Act, 1980
<b>Finance</b>	<b>See under individual headings.</b> However once the period of retention for audit purposes is complete (2 years from the completion of the audit), documents not required for permanent preservation may be destroyed. Provided properly compiled microfilm record is retained for the remainder of the prescribed period, embodying a suitable certificate by the treasurer as to its accuracy and completeness. This does not apply to forms SD55(ADP) and SD55J.		
	Accounts - Annual (Final - one set only)	Permanent	
	Accounts - Cost	6	
	Accounts - Working Papers	6	

SERVICE/DEPARTMENT	RECORD TYPE/SUB TYPE	RETENTION PERIOD (Years)	NOTES
	Accounts - Minor records (pass books; paying-in slips; cheque counterfoils; cancelled/discharged cheques (other than cheques bearing printed receipts - see Receipts); accounts of petty cash expenditure; travelling and subsistence accounts; minor vouchers; duplicate receipt books; income records; laundry lists and receipts)	6	
	Advance letters	6	
	Audit Records - original documents	6	From completion of the audit
	Audit Records (including Management Letters, VFM reports and system/final accounts memorandum)	6	After formal clearance by Statutory Auditor
	Bank Statements	6	From completion of the audits
	Benefactions	These documents must be considered for permanent preservation but the advice of the chief archivist of an appropriate place of deposit is to be obtained before any final decision is made. *	
	Bills receipts and cleared cheques	6	
	Budget Viarements	6	From completion of the last External Audit
	Capital Charges Data	6	From completion of the audit
	Capital Paid Invoices	6	The Limitation Act 1980
	Cash Sheets	6	The Limitation Act 1980
	Cost accounts	6	
	Creditor Payments	6	
	Debtors' records - cleared	6	From completion of the audit
	Debtors' records - uncleared	6	
	Demand Notes	6	

SERVICE/DEPARTMENT	RECORD TYPE/SUB TYPE	RETENTION PERIOD (Years)	NOTES
<b>To be confirmed</b>	Desk/Administration Diaries	To store for 7 years for Financial Implications & Audit purposes	
	Estimates: including supporting calculations and statistics	6	
	Expense Claims	6	From completion of the audit
	Feeder file reconciliations	6	From completion of the last External Audit
	Forms - Surgical Appliances - AP1, 2, 3 and 4.	6	From completion of the audit
	Forms - Superannuation - SD55 (ADP) and SD55J (copies)	10	Originals are sent to NHS Pension Agency
	Funding Data	6	
	FWH - Personal Record of Hours Actually Worked	1	
	Income and expenditure journals	6	
	Invoices	6	The Limitation Act, 1980
	Ledgers	6	The Limitation Act, 1980
	Non-Exchequer fund records	Although technically exempt from the Public Records Act, it would be appropriate for authorities to treat these records as if they were not so exempt. See Income and expenditure journals, etc..	
	Pay Roll - full-time medical staff	6	For superannuation purposes authorities may wish to retain such records until the subject reaches benefit age
	Pay Roll - other staff	6	
	PAYE Records	6	
	Patient Property Books	6	
	Patient withdrawal of money [F8]	6	
	Receipts for registered and recorded delivery mail	1.5	
	Receipts	6	The Limitation Act, 1980
	Requisitions	6	

SERVICE/DEPARTMENT	RECORD TYPE/SUB TYPE	RETENTION PERIOD (Years)	NOTES
	Salaries/Wages	10	For superannuation purposes authorities may wish to retain such records until the subject reaches benefit age.
	Stock Control Reports	1.5	
	Stores records - major (stores ledgers etc.)	6	
	Stores records - minor (requisitions , issue notes, transfer vouchers, goods received book etc.)	1.5	
	Superannuation Accounts	10	
	Superannuation Registers	10	
	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)	6	
	Tax Forms	6	
	VAT Records	6	In some instances, a shorter period may be allowed but agreement must be obtained from: <b>Custom &amp; Excise</b> , NHS Admin. Team, Dorset House, Stamford Street, London, SE1 9PY. Tel: 0171 202 4008 Fax: 0171 202 4505

SERVICE/DEPARTMENT	RECORD TYPE/SUB TYPE	RETENTION PERIOD (Years)	NOTES
<p><b>Health Records</b> <b>Hospital patient case records (individual)</b></p> <p><b>N.B.</b> This retention schedule does not cover GP medical records. Guidance on their retention can be found in HSC 1998/217 and ECL 2/68, both of which remain current at the time of issue of this circular HSC 1999/053</p> <p>Any reference to "conclusion of treatment" in the following recommended minimum retention periods, should be taken to include all follow-up checks and action in connection with the treatment.</p>	<ul style="list-style-type: none"> <li>• The retention periods which are listed below reflect minimum requirements of clinical need.</li> <li>• Personal health records may be required as evidence in legal actions; the minimum retention periods take account of this requirement.</li> <li>• It is not necessary to keep every piece of paper received in connection with patients. NHS Trusts should determine, in consultation with their health professionals, which elements should be considered as a permanent part of the record, and which should be transient and discarded as their value ceases.</li> <li>• Before any destruction takes place, ensure that               <ol style="list-style-type: none"> <li>(a) there is consultation with the relevant health professional body or records committee and actions clearly minuted;</li> <li>(b) any other local need is considered;</li> </ol>               and               <ol style="list-style-type: none"> <li>(c) the value of the records for long -term research purposes has been assessed, in consultation with an appropriate place of deposit.</li> </ol> </li> </ul>		
	- pre 1948 records		Should by now have been transferred for permanent preservation or destroyed. Any pre-1948 records which still exist should be considered for permanent preservation, undergoing an appraisal procedure as described in the box above
	Abortion- Certificate A (Form HSA1) and Certificate B (Emergency Abortion)	3	Abortion Regulations 1991, Statutory Instrument No. 499
	Accident & Emergency Registers	2 years on site & then to long term storage at Pickfords being marked appropriately that in 60 years to be sent to Archivist	Local decisions should be made with regard to the permanent preservation of theses records, in consultation with relevant health professionals and places of deposit
	Admission books	2 years on site & then to long term storage at Pickfords being marked appropriately that in 60 years to be sent to Archivist	Local decisions should be made with regard to the permanent preservation of theses records, in consultation with relevant health professionals and places of deposit

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	Birth registers (i.e. register of births kept by the hospital)	2 years on site & then to long term storage at Pickfords being marked appropriately that in 60 years to be sent to Archivist	Local decisions should be made with regard to the permanent preservation of these records, in consultation with relevant health professionals and places of deposit
	Children and young people	Until the patient's 25th birthday, or 26th if young person was 17 at conclusion of treatment; or 8 years after patient's death if death occurred before 18th birthday.	
	Death registers (i.e. register of deaths kept by the hospital)	Local decisions should be made with regard to the permanent preservation of these records, in consultation with relevant health professionals and places of deposit	
<b>Clinical Diaries not mentioned but very important and must be considered by Clinical Groups with Health Records</b>	<b>Clinical</b> Diaries	To be agreed with Clinical groups in line with their Professional Guidance and the Trust	
<b>To be confirmed</b>	Desk/Administration Diaries	To store for 7 years for Financial Implications & Audit purposes	
	Donor records	11 years post transplantation. Committee on Microbiological Safety of Blood and Tissues for Transplantation (MSBT); guidance issued in 1996.	
	Clinical Records General (not covered above)	8 years after conclusion of treatment or 8 years after death	
	Laboratory records	Local decisions should be made with regard to the permanent preservation of these records, in consultation with relevant health professionals and places of deposit	
	Maternity (all obstetric and midwifery records including those of episodes of maternity care that end in stillbirth or where the child later dies)	25 years	Refer to Circular HSG(94)11 for additional guidance on retention and storage of maternity records.
	Mentally disordered persons (within the meaning of the Mental Health Act 1983)	20 years after no further treatment considered necessary; or 8 years after the patient's death if patient died while still receiving treatment.	
	Nursing Records: ?? Types:	TBC	
	Occupational Health	40 years	

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	Oncology	8 years after conclusion of treatment especially when surgery only involved. Consideration may wish to be given to BFCO(96)3 issued by the Royal College of Radiologists which recommends permanent retention on a computer database when patients have been given chemotherapy and radiotherapy.	
	Operating Theatre registers	2 years on site & then to long term storage at Pickfords being marked appropriately that in 60 years to be sent to Archivist	Local decisions should be made with regard to the permanent preservation of these records, in consultation with relevant health professionals and places of deposit
	Patient involved in clinical trials	15 years after conclusion of treatment. EEC Note for Guidance: Good Clinical Practice for Trials on Medicinal Products in the European Community, section 3.17 (see- Pharmacology & Toxicology 1990,67,361-372.)	
Pharmacy records:	In-Patient Dispensing -Continuation sheets	2 years	
<b>(SEE ALSO UNDER INDEPENDENT CATEGORY OF PHARMACY FOR FURTHER DETAILS)</b>	Out Patient Prescriptions Discharge Prescriptions Supply of Controlled Drugs: <ul style="list-style-type: none"> <li>• Requisitions from wards and departments</li> <li>• Completed pharmacy registers</li> </ul>	2 years from date of dispensing 2 years from date of dispensing 3 years from date of last entry	
	Photographs	These documents must be considered for permanent preservation but the advice of the chief archivist of an appropriate place of deposit is to be obtained before any final decision is made. *	
	Private patient records admitted under Section 58 of the National Health Service Act 1977 or section 5 of the National Health Service Act 1946	Although technically exempt from the Public Records Acts, it would be appropriate for authorities to treat such records as if they were not so exempt. <b>See</b> above re Health Records Hospital patient case records	
	Creutzfeld -Jakob Disease (CJD)	List to be kept of all persons exposed to CJD dor 40 years after last known exposure	

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	X-ray films (including other image formats for all imaging modalities)	<ul style="list-style-type: none"> <li>General X rays, - hard copies current year &amp; following kept for 3 years</li> <li>Special Interest X rays kept indefinitely</li> </ul>	Local decisions should be made with regard to the permanent preservation of these records, in consultation with relevant health professionals and places of deposit
	X-ray registers	Local decisions should be made with regard to the permanent preservation of these records, in consultation with relevant health professionals and places of deposit	
	X- ray reports (including reports for all imaging modalities)	<ul style="list-style-type: none"> <li>Hard copies of X - ray Reports kept as for X rays - current year &amp; following 3 years. Electronic copy of report held indefinitely</li> </ul>	To be considered as a permanent part of the patient record - <b>See</b> above re Health Records Hospital patient case records
<b>Notes on preservation of patient records for historical purposes</b>			
Please refer to Guidance contained in Circular HSC 1999/053 or speak to the Records Manager			
<b>Health &amp; Safety</b>	? Accident Books ? Incident Reporting forms	?? Link this section with the Clinical Governance Section	<b>No information at present as to what to be included. Details to be confirmed by Clinical Governance Committee/Governance &amp; Risk Management Committee</b>
<b>Hospital Services</b>	Hospital Services	10	
	Laundry Lists and Receipts	2	From completion of the audit
	Paper correspondence connected with Environmental issues	6	Results sent out are kept on computer indefinitely
<b>Human Resources</b>	CVs for non-executive directors (successful)	5	Following term of office
	CVs for non-executive directors (unsuccessful)	2	Following what would have been the term of office had the applicant been successful.

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<b>Awaiting clarification of wording from Personnel regarding statement under Notes</b>	Establishment records - major (e.g. personal files, letters of appointment, contracts, references & related correspondence)	6	Keep for 6 years after subject of file leaves service, or until subject's 70th birthday, whichever is the later. Only the summary needs to be kept to age 70; remainder of file can be destroyed 6 years after subject leaves service.
	Establishment records - minor (e.g. attendance books, annual leave records, duty rosters, clock cards, timesheets) Sickness , F200	2	
<b>As advised by External Auditors</b>	FWH - Personal Record of Hours Actually Worked	1	
	Job Advertisements	1	
	Job Applications (following termination of employment)	3	
	Job Descriptions (following termination of employment)	3	
	Leavers Dossiers (provided summary retained)	6	
	Letters of appointment	6	
	Nominal Rolls	6 (max.)	As a general rule, it may be appropriate for only the current nominal roll and the immediately preceding roll to be kept)
	Personnel Files	6	<b>See</b> Establishment records - major
	Staff Records	6	<b>See</b> Establishment records - major
	Study leave Applications	1.5	
	Time Sheets	2	<b>See</b> Establishment Records - minor
<b>Industrial Relations</b>	Industrial Relations (not routine staff matters)		These documents must be considered for permanent preservation but the advice of the chief archivist of an appropriate place of deposit is to be obtained before any final decision is made. *

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<b>Information Services</b>	Patient Administration Systems: Indexes	Lifetime	Registry lists may describe public records marked for permanent preservation, or contain the record of management of public records. they should in these cases be retained permanently. File-lists and document lists, where public records, or their management are not covered, should be retained until they have no further administrative use.
	Korner Records	3	
	Patient Activity Data	3	
<b>IT</b>	Software licences	Lifetime	
	Specifications	6	The Limitation Act 1980
<b>Pharmacy</b>	In-Patient Dispensing -Continuation sheets	2 years	
	Out Patient Prescriptions	2 years from date of dispensing	
	Discharge Prescriptions	2 years from date of dispensing	
	Supply of Controlled Drugs: <ul style="list-style-type: none"> <li>• Requisitions from wards and departments</li> <li>• Completed pharmacy registers</li> </ul>	3 years from date of last entry	
	Procurement of medicinal products and other products purchased on official orders generated in the pharmacy: <ul style="list-style-type: none"> <li>• Copies of official orders</li> <li>• Delivery notes</li> <li>• Invoices</li> </ul> <p>Computer records which will include details of supplier and batch number of product</p>	3 years At the discretion of the Principal Pharmacist - 2 years To be retained by Finance Department for 6 years 11 years from date of receipt	

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	Stock checks	18 months	
	Preparation of medicinal products for stock: <ul style="list-style-type: none"> <li>• Batch preparation record</li> </ul>	10 years after expiry of product	
	Extemporaneously compounded medicines including those prepared aseptically: <ul style="list-style-type: none"> <li>• Extemporaneous dispensing record</li> </ul>	10 years after expiry of product	
	Repackaging of medicinal products in the dispensary or packing unit: <ul style="list-style-type: none"> <li>• Repackaging/labelling record</li> </ul>	10 years after expiry of product	
	Preparation of radiopharmaceuticals: <ul style="list-style-type: none"> <li>• Records relating to preparation of doses</li> <li>• Records relating to administration of doses</li> </ul>	10 years after expiry of product  10 years after expiry of product	
	Quality control: <ul style="list-style-type: none"> <li>• Records relating to testing of ingredients and finished products from above activities</li> </ul>	10 years after expiry of product	
<b>Planning</b>	Leases		These documents must be considered for permanent preservation but the advice of the chief archivist of an appropriate place of deposit is to be obtained before any final decision is made. *
	Project Files (over £100,000) on termination - including abandoned or deferred projects		These documents must be considered for permanent preservation but the advice of the chief archivist of an appropriate place of deposit is to be obtained before any final decision is made. *

Since this is not deemed to be an exhaustive list there will be further records that the Trust will have to include in its Strategy.

**Places of deposit -**

The nearest recommended place of permanent deposit (for records of 60 years or more) for West Gloucestershire Trust is:

**Gloucestershire Records Office:** Tel: 01452 425295