

ADULT CARE SERVICES			
Reference	Description of Record	Point of Closure	Total Retention Period
CARERS			
Information relating the provision of care			
CAH	Carers records (Shared Lives Carers)	End of service or death	7 years
CAH	Records relating to use of 'agency' provided services	End of service	7 years
COMMUNITY SUPPORT			
Information relating the provision of support in the community			
CAH	Community Support Service User records	Refer to relevant classes under residential services	Refer to relevant classes under residential services
CAH	Day Service User records	Refer to relevant classes under residential services	Refer to relevant classes under residential services
RESIDENTIAL HOMES & IN-HOUSE PROVIDER SERVICES			
Information relating to the provision of care in residential homes and by in-house providers			
CAH	Risk assessments	Retain previous until new one replaces it	Until it is superseded
CAH	Purchasing excluding medical devices and medical equipment	Date of purchase	3 years
CAH	General operating policies and procedures	Retain current and previous version	3 years
CAH	Any incidents, events or occurrences that require notification to the Care Quality Commission	Date of notification	3 years
CAH	Use of restraint or the deprivation of liberty	Date of incident	3 years
CAH	Detention	Date of detention	3 years
CAH	Maintenance of premises	End of financial year	3 years
CAH	Maintenance of equipment	End of financial year	3 years
CAH	Electrical Testing	Date of testing	3 years
CAH	Fire Safety	Date of testing	3 years
CAH	Water Safety	Date of testing	3 years
CAH	Medical Gas Safety	Date of testing	3 years
CAH	Money or valuable deposited for safe keeping	End of financial year	3 years
CAH	Staff employment	Following date of last entry	3 years
CAH	Duty Rosters	End of financial year	4 years
CAH	Purchasing of medical devices and medical equipment	Date of purchase	11 years
CAH	Final annual accounts	End of financial year	30 years

Reference	Description of Record	Point of Closure	Total Retention Period
SUPPORTING ADULTS			
Information relating to the provision of services that support adults			
CAH	Adult Care Service User record (Includes personal information, assessments, reviews, Safeguarding, OT, adaptations, finance, grants, correspondence and health details)	End of service or death	7 years
CAH	Learning Difficulty Service User record (Includes personal information, assessments, reviews, Safeguarding, OT, finance, grants, correspondence and health details)	End of service or death	7 years
CAH	Mental Health Service User record (Where there has been involvement with Avon & Wiltshire NHS Partnership Trust)	End of service or death	20 years - End of Service 8 years Death
CAH	Occupational Therapy Service User record	End of service or death	7 years
CAH	Referrals (No further action or service provided)	End of calendar year in which referral received	1 year
CAH	Safeguarding Adult Case record	End of service or death	7 years
CAH	Safeguarding Adults (Institutional) record		
SUPPORTING DISABILITIES			
Information relating to supporting adults with disabilities			
CAH	Supported Employment Service User record	End of calendar year in which service ceased	7 years
CAH	Registers of Disabled, Blind, or Partially Sighted or with a Hearing Loss people		
CAH	Travel Training records (Adults)	End of calendar year in which service ceased	7 years (unless LAC, CP, CIN, SEND)