



**Information, Technology and Customer Services  
Information Services**

## **Record Retention Schedule**

Economy, Communities & Corporate  
Technical & Parking Services  
**Bereavement Services**

**October 2007**

## Introduction

This retention schedule lists the minimum length of time to keep the records generated as a result of the business processes for Bereavement Services. This schedule is updated according to Acts of Parliament, Statutory Instruments, Approved Codes of Practice and current Council practices and financial regulations. The scheme follows the Retention Guidelines for Local Authorities produced by the Records Management Society of Great Britain.

The retention period is taken from the date of file closure, and applies to records stored in all media (including paper and electronic versions). When records are destroyed at the end of their retention period, all backup copies must also be destroyed as far as possible, in order to ensure compliance with the Data Protection Act 1998 and the Freedom of Information Act 2000. In cases of investigation by Police, Internal Audit, or the Audit Commission all destruction procedures on the information concerned must cease immediately regardless of storage format. Equally, no records should be destroyed once they are known to be the subject of a Freedom of Information Act 2000 request.

Records for permanent preservation should be passed to the Herefordshire Record Office. Contact the Senior Archivist for information on transfer procedures. The Record Office may choose to keep a sample of certain classes of record for permanent preservation, but this will be agreed beforehand with depositing departments.

Descriptions of each process are found in the Corporate File Plan for Bereavement Services. Within the schedule, the storage format shows the medium in which the record is held. Special processes show if any changes are made to the class of record throughout its life, such as if it is scanned or microfilmed at a certain point. The retention period is the minimum length of time for which the class of record should be kept, whilst the action is to destroy, archive or review the records once they reach the end of their retention period, and Herefordshire Council has no further business use for them. The reason for retention includes any legislative or regulatory reason on which the retention period is based.

Adhering to the retention schedule is a requirement of Herefordshire Council's Records Management Policy, found on the Intranet Info Library under "*Records Management*". The schedules also give consistent instruction to all staff dealing with records.

## When to use the retention schedule

This retention schedule is designed for use in the following ways:

- When **creating records**, this retention schedule will act as a guide to the conditions under which that record should be managed, stored and ultimately disposed of.
- When **designing filing systems**, this retention schedule will give a clear understanding of the legal and business requirement for record keeping,
- When **managing offices**, this retention schedule will give a clear understanding of which records should be transferred to the Modern Records Unit and/or the Archives Service, and which records should eventually be destroyed, thus maximizing office space.
- When **destroying records**, this retention schedule will minimize the risk that records are destroyed before they should be, or kept for longer than they need to be kept.

## Updates to the schedule

The schedules will be regularly reviewed to incorporate any changes to business practice. If you have any comments or queries regarding this schedule, please contact

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Bereavement Services		Storage Format	Special Processes	Retention Period	Action	Reason for Retention
	<b>Burial and Cremation Paperwork</b>	Paper	None	15 Years	Destroy	Operational
	<b>Emissions Records</b>	Paper/Electronic	None	6 Years	Destroy	Operational
	<b>Permits</b>	Paper	None	Permanent	Offer to Archive Service if use ceases	Operational
	<b>Register of burials / cremations</b>	Paper	None	Permanent	Offer to Archive Service if use ceases	Operational
	<b>Statistics</b>	Paper	None	6 Years	Destroy	Operational

Finance		Storage Format	Special Processes	Retention Period	Action	Reason for Retention
	<b>Budget - Monitoring</b>	Electronic	None	6 Years	Destroy	Herefordshire Council financial regulations

	<b>Payroll</b>					
	- <b>Flexi Timesheets</b>	Electronic	None	2 Years	Destroy	Herefordshire Council financial regulations
	- <b>Travel Claims</b>	Electronic	None	6 Years (originals)	Destroy	