

KENT SHARED LIVES

Policies & Procedures

Record keeping and access to files

Retention of record

Document	Retention time – from last contact
Individuals medication records	<ul style="list-style-type: none"> • Records of administered medication should be kept for 3 years and 4 months from the date of the administration (in line with personal injury claim requirements). • These can be destroyed once past this date or returned to Shared Lives for destroying.
Individuals finance sheets	<ul style="list-style-type: none"> • Current year + 6 years • These can be destroyed or returned to Shared Lives.
Diaries/daily logs relating to individuals	<ul style="list-style-type: none"> • Current year + 6 years (the time in which a claim for negligence could be made) • Records need to be destroyed after this date or returned to Shared Lives.
Monitoring visits and annual reviews	<ul style="list-style-type: none"> • Current year + 6 years (the time in which a claim for negligence could be made) • Shared Lives will keep a copy of these records and so if you wish to destroy them sooner then the 7 years these will be available from Shared Lives.
Hosts training certificates	<ul style="list-style-type: none"> • Current year + 6 years (the time in which a claim for negligence could be made)
Care and Support plans/Pathway plan/Individuals review/Assessments	<ul style="list-style-type: none"> • All of this information should be included on the relevant individual file and then retained for the length of period of the placement in the hosts home. • When this ends this information needs to be returned to Shared Lives.
Accident/Incident forms – Individuals and Hosts	<ul style="list-style-type: none"> • Date of incident + 4 years
Medical information	<ul style="list-style-type: none"> • Any medical information supplied to the host relating to the placed individuals should be disposed of once the placement has ceased, unless there is a major incident where the medical information which was available should be submitted with the incident report.
Bank statements – individual	<ul style="list-style-type: none"> • Current year + 6 years. • After this date these need to be destroyed or returned to Shared Lives.
Benefit letters /correspondence	<ul style="list-style-type: none"> • Current year + 6 years. • After this date these need to be or returned to Shared Lives.