

Asset Number	Name of Asset	Function	Retention Period	Is the Data Legally Required to be Kept?
<b>Civil Contingencies: Health and Safety</b>				
	TEN Health and Safety system	Library of risk assessments, safe systems of work and incident/accident reports	Incidents regarding accidents - 3 years from closure. Incidents regarding accidents - 25 years from closure.	Yes
	Accident books	Books containing reports of incidents and accidents	Incidents regarding accidents - 3 years from closure. Incidents regarding accidents - 25 years from closure.	Yes
	Rest centre information	Information collected to help manage an incident and may also be used afterwards to look into the handling of the incident	Information will be destroyed once the administrative used is concluded	No
	Disaster Recovery Suite of Plans	A suite of Plans to help SSDC recover from Disasters including technology and property	Disaster Recovery plan is kept up to date	No
	Out of hours service log	A log of all calls received through the out of hours helpline	Information will be destroyed once the administrative used is concluded	No

	Staff Emergency Contact List	A list of officers and their contact number who may need to be contacted out of hours	Information will be destroyed once the administrative used is concluded	No
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<b>Community Health and Leisure</b>				
	Weight Loss Challenge weekly and monthly weigh in data	This information is collected from participants to monitor their weight loss during the challenge	Anonymise after two years	No
	Walking Football, Golden Age Olympics, Playing Out and Pop Up Sport registration and registers	This information is collected for registration purposes including medical information for health and safety purposes and to monitor attendance	Delete registration details once entered on the Balance Score Card or at the end of the project whichever is earlier	No
	Newsletter Contact Database	Email addresses of those who have signed up to receive the newsletter	Information about individuals will be kept as long as they want to receive the newsletter	No
	Junior Athletic Programme Administrative Documents	Information relating to the administration and management of the Junior Athletic Programme	Paper form destroyed once input on to Spreadsheet to be kept current year plus one	No

	Holiday Activities Administrative Documents	Information relating to the administration and management of the different Holiday Activities that are organised by SSDC	Paper form destroyed once input on to Spreadsheet to be kept current year plus one	No
	Yeovil Recreation Facilities Booking Information	Information relating to administration and management of bookings for the Yeovil Recreation Ground facilities	Paper form to be destroyed once administrative is concluded	No
	Passport to Leisure Administrative Documents	Information relating to the administration and issuing on Passport to Leisure passes	Paper form destroyed once input on to database to be kept current year plus one	No
	Track & Key Passes Administrative Documents	Information relating to the administration and management of Track and Key Passes	Track pass - Paper form to be destroyed once input on Spreadsheet to be deleted at the end of financial year Key Record Sheet - form to be destroyed once administrative is concluded	No
	Finance Income Return Sheets	Information relating to the administration of the daily income received with the CHL team	Information to be retained by Cashiers for 7 years	Yes

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<b>Communications</b>				
	South Somerset News Distribution list	A list of emails of individuals who have subscribed to receive the South Somerset News newsletter	List kept up to date	No
	Marketing photos and Video Footage	Photos and video footage taken at SSDC events for use in future marketing activities	Photos will be destroyed after 2 years	No
	Journalist Distribution List	A list of emails of journalists to whom we distribute press release	List kept up to date	No
	Copies of press releases	Copies of all the press releases which have been released by the Council	Permanent - offer to archivist	No

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<b>Countryside</b>				

	Volunteer Registration Documentation and Photographs	Information regarding volunteers undertaking work on behalf of SSDC and photographs of individuals whilst volunteering	Form is updated annually and destroyed if no longer a volunteer	No
	Images	Pictures and video footage of individuals events held by the Countryside team for the purpose of marketing, funding bids and reporting to members	Photographs will be deleted 2 years after they have been taken and video footage will be deleted after three years	No
	Café till receipts	Receipts from card transactions	TBC	Yes
	Website	Public website used to advertise and book events including payment	Information is deleted once the event has finished	No
	Group booking information	Information relating to the booking and delivery of a Ranger led session	Information is destroyed at the end of each year	No
	Countryside sales receipts	Receipts for cash and cheque payments for Countryside sale	Destroy 6 years after last transaction in receipt book	Yes
	General correspondence	Correspondence from individuals including complaints, compliments and queries	Destroy 2 years after administrative use is concluded	No

	Yeovil Country Park Memorial Arboretum	Information relating to the planting and management of trees in memory of deceased individuals	Permanent - Offer to Archivist	No
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<b>Crematorium</b>				
	Documents relating to a cremation	Information is processed for administrative purposes in order for the cremation to be undertaken Includes application, medical certificate and particulars for cremation	Paper files destroyed after 15 years Computer records - Permanent - Information is archived for historical purposes	
	Cremation Register	Register detailing all cremation at the Yeovil Crematorium including details of the applicant	Permanent - Information is archived for historical purposes	
	Documents relating to an interment	Information is processed for administrative purposes in order for an interment to be undertaken	Paper files destroyed after 15 years Permanent - Information is archived for historical purposes	
	Cemetery Register	Register dating back to the 19th century detailing interments within Yeovil	Permanent - Information is archived for historical purposes	

	Documents relating to memorial tablets	Information is processed for the purposes of the management and administration around memorial tablets	Destroy once administrative use is concluded	No
	Feedback Forms	Forms are sent out to applicant requesting feedback about the service for monitoring purposes	1 year	No

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<b>Customers First</b>				
	Customer request information	Information is obtained in order to action a request for a customer for example requesting a new bin or taking a payment	Currently under review	

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				be Kept?
<b>Elections</b>				
	Register of Electors	Summary certification of those eligible to vote including applications for absent voting and administration of elections	Permanent - offer to archivist	Yes
	Election documents not available for public inspection: <ul style="list-style-type: none"> <li>• Completed Ballot Papers</li> <li>• Completed corresponding number lists</li> <li>• Certificates of employment on duty on polling day</li> <li>• Nomination Papers</li> </ul>	Record of individuals voting in an Election and other Election administration that is not available for public inspection without a Court Order	Destroy 1 year from close of poll	Yes
	Election documents available for public inspection: <ul style="list-style-type: none"> <li>• Marked register of electors</li> <li>• Marked postal voters' list</li> <li>• Marked list of proxies</li> <li>• Marked postal proxy voters' list</li> <li>• Any other document relating to the election (except those not available for public inspection)</li> </ul>	Record of those who have voted and by what means (but not their actual vote) and other general Election administration	Destroy 1 year from close of poll	Yes
	Declarations of result (Local elections)	Consolidated returns of votes received	Permanent - offer to archivist	No
	Declarations of result (Other)	Consolidated returns of votes received	Permanent - offer to archivist	No



	Previous Election results	Consolidated returns of votes received	Permanent - offer to archivist	No
	List of Elections Staff - non-SSDC	Management of staff for elections and canvassing	Paperwork destroyed after 1 year from close of poll Electronic copies destroy after administrative use is concluded	No
<b>Democratic Services</b>				
	Ward Member's Contact Details	Information publicly provided in relation to Ward Member's Council work including annual expenses	Destroy after administrative use is concluded	No
	Ward Member's Personal Information & payment of expenses	Information relating to individual development and Payroll	Destroy after administrative use is concluded	Yes
	Decision Making Documentation <ul style="list-style-type: none"> <li>• Agendas</li> <li>• Decisions</li> <li>• Minutes</li> <li>• Executive Forward Plan</li> </ul>	Formal record of all decisions taken by Committees, Portfolio Holders and Full Council	Permanent - held in internal archive	Yes
	Decision Making Documentation <ul style="list-style-type: none"> <li>• Clerks notes of meeting</li> </ul>	Hand written notes made to record meetings and decisions	Destroy 3 months after the confirmation of the minutes	Yes

	Scrutiny Task and Finish Work	Documents and research for Task and Finish Work	Destroy after administrative use is concluded	Yes
	Appointment of Members to outside Organisations	Details of individual members who have been appointed to represent the Council with outside Organisations	Permanent - held in internal archive as part of Minutes of Decision that have been made	Yes
	The Council's Constitution	Details of the governance arrangements of the Council	Destroy after administrative use is concluded	Yes
	SSDC Members Register of Interest Forms including details of gifts and hospitality	Information relating to Member's disclosure of any involvement in organisations and income received from other bodies and details of any gifts or hospitality received	Destroy after administrative use is concluded	Yes
	Parish and Town Council Members Register of Interest Forms including details of gifts and hospitality	Information relating to Member's disclosure of any involvement in organisations and income received from other bodies and details of any gifts or hospitality received	Destroy after administrative use is concluded	Yes
	Complaints about Members	Information relating to complaints about Members at District, Town and Parish level	Where complaint requires a routine response destroy 2 years after administrative use is concluded Where complaint requires a detailed response destroy 6 years after administrative use is concluded	
	Community Governance Reviews	The administration of undertaking a CGR to consider one or more of a defined set of criteria and	Responses destroyed after responses are anonymised and collated	Yes

		implementing decisions taken by Full Council	CGR Decision Implementation Documents - Permanent	
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<b>Economic Development: Yeovil Innovation Centre (YIC)</b>				
	YIC Tenant Files (including old tenants)	Information is held on the tenants including current and previous licences, correspondence and contact details	Signed contract - destroy 6 years after the terms of contract have expired Correspondence relating to the management of the contract - destroy 2 years after the terms of contract have expired	
	YIC Virtual Tenant Files (including old virtual tenants)	Information is held on the tenants including current and previous contracts, correspondence, contact details and proof of identity e.g. copy of driving licence, passport or utility bill	Signed contract - destroy 6 years after the terms of contract have expired Identity documents - destroy on the expiration of the contract terms	
	New Enquiry Tracker Sheet	Information such as name, email address and telephone number is collected from anyone enquiring about leasing a suite in the YIC	Personal details removed after 12 months	

	YIC Financial Documents	Assists with the financial management of the YIC	6 years	
	Telephone call recording system	System records all telephone calls made and received including start and end time, the number called/ called in and which business for the purpose of billing businesses for calls made and received	Currently held indefinitely	
<b>Economic Development: Yeovil Innovation Centre (YIC) - Community Heritage Access Centre (CHAC)</b>				
	Donor Information <ul style="list-style-type: none"> <li>• Object Record Sheet</li> <li>• Museum Object Entry Form</li> <li>• Modes System</li> <li>• Accession Register</li> <li>• Disposal File</li> </ul>	Information is collected about items that have been donated, loaned etc and by whom they were donated and loaned	Destroy 10 years after the closure of CHAC	No
	Enquiry sheet	A list of enquiries is kept to evidence information supplied and to whom	Anonymise after 1 year	No
	Volunteer & Work Experience Students details	Information is collected about volunteers and work experience student, this may include details of any medical conditions they may have	Destroy once volunteer has left or work experience has come to an end	No

<b>Economic Development: Yeovil Innovation Centre (YIC) - Tourism</b>				
	Tourism Database	Database of all business contact details including names, addresses, email addresses and websites Database used to email newsletter to businesses on the database	Database is kept current If someone withdraws consent, details are deleted	No
	Discover South Somerset Brochure & Discover Somerset Gardens Brochures	Yearly brochures produced to advertise businesses and Gardens in South Somerset	Database and brochure is kept current	No
	Discover South Somerset Website	Website to advertise businesses and events in South Somerset	Website is kept current	No
	Literature Exchange Event Documentation	Documentation to assist with the management and administration of the Literature Exchange Event	Registration Forms will be destroyed once the administrative use is concluded	No
<b>Economic Development</b>				
	SSDC4Business Newsletter mailing list	A list of emails of those who have signed up for the SSDC4Business Newsletter	Contacts will be removed from the list if consent is withdrawn List is kept up to date	No
	General ED advice requests	Information relating to the request of Economic Development advice.	Emails kept as per Corporate Email Archive	No

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<b>Environmental Health: Food and Safety</b>				
	RIDDOR Accident Reports	Reports of serious incidences at work that are reportable under RIDDOR as reported to the HSE Information received from the HSE	If report is for an adult then destroy 3 years from closure  If report is for a child then destroy 25 years from closure	Yes
	Cooling Tower Notifications	Notification of a Cooling Tower or Towers on site	Destroy 2 years after registration lapses	Yes
	Food Registration Records	Information relating to the registration of Food Premise	Destroy 2 years after registration lapses	Yes
	Food Hygiene Inspection Records	Information relating to hygiene standards for food businesses	Destroy 6 years from date of inspection	No
	Infectious Disease Notifications	Reports of infectious diseases Information received from the PHE	Destroy 3 years for the last action	No
	Premises and TENs consultation records	Information relating to Premise applications and TENS application for the purpose of consultation	Destroy after 2 years	No

	Acupuncture, Tattooing, Ear Piercing, Electrolysis & Special Treatments Registration Records	Information relating to the registration of Acupuncture, Tattooing, Ear Piercing, Electrolysis & Special Treatments premises	Record to be destroyed 2 years after registration has been surrendered/seized/forfeited/r evoked	No
	TB Notification	Information relating to an incident of a TB restriction Information received from the AHVLA	Destroy 3 years for the last action	No
	Health & Safety Inspection records	Information relating to the inspection of businesses for the purpose of Health & Safety	Destroy 6 years from date of inspection	No
<b>Environmental Health: Food and Safety: Environmental Protection</b>				
	Service requests relating to noise	Information relating to the investigation of a noise complaint including information obtained using RIPA	Destroy 3 years from last action	Yes
	Service requests relating to pollution	Information relating to the investigation of a pollution complaint including odour; light pollution; drainage; waste; dust	Destroy 3 years from last action	No
	Services requests relating to burning	Information relating to the investigation of a bonfires, burning and smoke complaint	Destroy 3 years from last action	No

	Services requests relating to filthy and verminous premises	Information relation to the investigation of filthy and verminous premises	Destroy 3 years from last action	No
	Service requests relating to "fly-tips"	Information relating to the investigation of a fly tip	Destroy 3 years from last action	No
	Public Health Funeral records	Information relating to handling of a Public Health funeral	Destroy 3 years from last action	No
	Service requests relating to water sampling	Information relating to the sampling and risk assessment of both private and public water sampling	Destroy 3 years from last action	No
	Air quality monitoring information	Information relating to the monitoring of air quality	Permanent - offer to archivist	No
	Contaminated land identification, investigation and remediation information	Information relating to the identification, investigation and remediation of contaminated land	Permanent - offer to archivist	No
	Licensing & Planning Consultations	Information relating to Premise applications, TENS applications and Planning applications for the purpose of consultation	Destroy after 2 years	No
	Pollution Prevention Control records	Information relating to the inspection of prescribed premises for the purpose of pollution control	Remove from public register 3 months post lapse of permit and destroy after 4 years post lapse of permit	No
	Enforcement files including fixed penalty notices, witness statements and interviews under caution	Information relation to investigation and enforcement of Environmental Protection statutory contraventions	Destroy 7 years from investigation complete	Yes



	Service requests for pest control	Information relating to the request for the investigation and treatment of pests	Destroy 3 years from last action	No
<b>Environmental Health: Food and Safety: Enforcement</b>				
	Service request for the collection of a stray dog	Information relating to the collection and ownership of a stray dog	Destroy 3 years from last action	No
	Service request for the investigation of a dangerous dog	Information relating to the investigation into a dangerous dog	Destroy 3 years from last action	No
	Service requests relating to the reporting and investigation of dog fouling	Information relating to the reporting and investigation of dog fouling	Destroy 3 years from last action	No
	Service requests relating to the reporting, investigation and destruction of abandoned vehicles	Information relating to the reporting, investigation and destruction of abandoned vehicles	Destroy 3 years from last action	No
	Service request relating to the reporting and investigation of littering offences	Information relating to the reporting and investigation of littering offences	Destroy 3 years from last action	No
	Service request relating to the reporting and investigation of fly posting	Information relating to the reporting and investigation of fly posting	Destroy 3 years from last action	No

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<b>Finance</b>				
	General Ledger; Purchase Order Processing; Purchase Ledger; Accounts Receivable Documentation	The administration of payments to and from SSDC	Destroy 6 years after the conclusion of the transaction	Yes
	Business Intelligence Reports	Run reports from the information held within E5 Financial Management System for various purposes	Destroy when administrative use is concluded	No
	Statement of Accounts	Published finance position of SSDC	Permanent - offer to archivist	Yes
	Invoices	A record of all paid invoices	Destroy 6 years after the conclusion of the transaction	Yes
	Card payment system	Processes electronic debit and credit card payments Reports are run from the system to help daily reconciliation	Destroy 6 years after the conclusion of the transaction	Yes
	Axis Income Management (AIM) - Cash Receipting	Processes all payment transactions Reports are run from the system to help daily reconciliation	Destroy 6 years after the conclusion of the transaction	Yes

	Coinage	Records payments from kiosks Reports are run from the system to help daily reconciliation	Destroy 6 years after the conclusion of the transaction	Yes
	Salary Information	Spreadsheets maintained to budget for and monitor salary budget	Destroy after next year's budget has been adopted	No
	Direct Debit instructions	Scanned copies of all Direct Debit instructions received from customers	Destroy 6 years after the conclusion of the transaction	Yes
	HMRC CIS Information	Information used to file Construction Industry Scheme returns to HMRC	Destroy 6 years after the conclusion of the transaction	Yes
	HMRC VAT Information	Information used to file VAT returns to HMRC	Permanent - offer to archivist	Yes
	Spike Cavell	Used to publish information of Council's spending over £500 and analysis and risk management	Destroy 6 years after the conclusion of the transaction	Yes
<b>Insurance</b>				
	Claims records	Documentation relating to claims made against the Council or claims made by the Council	Destroy 7 years after all obligations and entitlement are concluded	Yes
	Insuring against loss <ul style="list-style-type: none"> <li>• Insurance policies</li> <li>• Renewals</li> </ul>	Documentation relating to insurance policies and renewal information	Destroy when administrative use is concluded	No

Asset Management				
	Asset Register	Lists all assets for accounting purposes	Permanent - offer to archivist	Yes
	Property Booklet	Quick reference overview of all assets	Updated every two years	No
	Database of land and property	Electronic record of all land SSDC has ownership or responsibility for including reporting and reviewing assets	Permanent - offer to archivist Reports - destroy when administrative use is concluded	No

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Housing and Welfare: Welfare Advice				
	Welfare Advice e.g. general benefit checks and 'what if' calculations	Information is gathered in order to provide accurate advice	12 months	No
	General Casework e.g. form filling and benefit claims	Information is gathered in order to assist with clients' cases	2 years	No

	Appeals - 'debating a point of law'	Information is gathered to assist with preparation of appeal	6 years	Yes
	Other client information e.g. names, addresses	Information is gathered to log cases for statistical purposes for committee reports and members and ongoing case management	6 years	Yes
<b>Housing and Welfare: Housing Finance</b>				
	Deposit Guarantee Scheme (DGS) Casework	Information to assess eligibility for the scheme, recouping the money and documentation for applications	6 years from when guarantee has been recovered	Yes
	Housing Finance Spreadsheets	Assists with the financial management for the Housing Service	6 Years	Yes
	Housing Benefit Schedules	Information is shared by the benefits team to list Housing Benefit payments made when acting Housing are acting as landlords	6 Years	Yes
<b>Housing and Welfare: Housing Advice</b>				

	The registration of housing applications & the process for applying for housing within the Homefinder Somerset Scheme	Information gathered to assess eligibility for the Homefinder Scheme, bidding history and information which is considered by participating Housing Associations	When any 'active Homefinder Somerset' application reaches 6 years  When any house cancelled or closed application reaches 2 years Documents that have been scanned on to the J Drive will be deleted from the drive once attached to the household's record on Abrisas	No but part of HomeFinder Somerset Partnership Agreement
	Sensitive Information File	Sensitive Information is sometimes sent by Social Services which could be relevant to housing applications, but is not appropriate to scan on to Abrisas, so is kept separately	Destroyed after administrative use is concluded	No
	CCTV used in Housing Advice Centre	To monitor the site to ensure the safety of the building and staff	Footage is overwritten every 30 days	No
	System User Information	Permissions and roles of all Abrisas users within the participating local Authorities and Housing Associations is on Abrisas, new starter forms submitted by SSDC officers, and a spreadsheet of current and ex ' SSDC officers are kept to monitor use of system	New started forms are deleted once user has left organisation  Spreadsheet is updated to show that user has left and no longer has access to system as users can't be deleted from the Abrisas system	No

	Housing Advice Administrative Spreadsheets e.g. banding appeals, MP letters, complaints & compliments	Information is recorded for statistical and monitoring purposes	The current year plus the previous year will be retained	No
	Visitor's Log	Information gathered to evidence number of people coming to the office; may include surname, reason for visit, any room used, and what was done	The current year plus the previous year will be retained	No
<b>Housing and Welfare: Gypsy Sites</b>				
	Homefinder residents of gypsy sites	Keeps a running record of tenancy issues	When any 'active Homefinder Somerset' application reaches 6 years; When any house, cancelled or closed application reaches 2 years	No but part of HomeFinder Somerset Partnership Agreement
	Waiting list for Gypsy Land	To keep a running record of demand for pitches and then for allocation	6 years	No
	Gypsy Tenancies Spreadsheet	For a quick summary of current residents and tenancy start dates Also to be used in conjunction with Word for mail merges	6 years from end of tenancy	No

	Gypsy Unauthorised Encampment	To monitor where sites are being used for unauthorised encampment	Paper file destroyed 12 months after unauthorised encampment  Spreadsheet depersonalised 12 months after unauthorised encampment	No
<b>Housing and Welfare: Homelessness Prevention</b>				
	Homelessness Applications	Information is collected in support of an application for support with homelessness prevention and temporary accommodation	When any 'active Homefinder Somerset' application reaches 6 years  When any house, cancelled or closed application reaches 2 years Documents that have been scanned on to the J Drive will be deleted from the drive once attached to the household's record on Abrisas	No but part of HomeFinder Somerset Partnership Agreement
	Sensitive Information File	Sensitive Information is sometimes sent from the Probation Service and minutes from MAPPA regarding sensitive information about individuals in the progress of making a homelessness application	Destroyed after administrative use is concluded	No



	County Court Desk documents	Information is sent by landlords and mortgage providers when action for repossession is being taken against the individual(s) Those individuals are contacted offering advice and assistance with the repossession case	Information will be destroyed on Abrisas as per it's retention policy Paper documents destroyed after administrative use is concluded	No
<b>Housing and Welfare: Careline</b>				
	Client records (client's details e.g. name, address, DOB, medical and medication details, key safe information, emergency contacts, other relevant information such as dates of holidays, details of carers, do not resuscitate requests, all calls in and out - records telephone number, date and time of call and duration of call)	Information is collected about the clients to assist with response calls, home visits and the management of accounts e.g. invoices	Information is deleted from PNC once the contract has been cancelled and the machine returned  Paperwork either contained in the lockable filing cabinets or scanned onto the J Drive are deleted 1 year after the contract has been cancelled	No
	Careline Administrative Documents: <ul style="list-style-type: none"> <li>Stepping Stone Documentation</li> <li>Telecare Spreadsheet</li> <li>Referral book</li> <li>Stock book</li> </ul>	Information is collated and recorded to help with the administration of Careline for management, monitoring and reporting purposes	Stepping Stone Documentation and Stock book destroyed after current year plus one year  Referral book destroyed after 2 years Telecare Spreadsheet - records will be deleted a year after Careline contract has been cancelled	No

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<b>Human Resources</b>				
	Personal files: <ul style="list-style-type: none"> <li>• Application Form</li> <li>• Eligibility to work documentation</li> <li>• DBS-related information</li> <li>• Job Description</li> <li>• Contract of Employment</li> <li>• Contract Variations</li> <li>• Disciplinary records</li> <li>• Grievances</li> <li>• Training record</li> <li>• Maternity/paternity records</li> <li>• Absence monitoring - return to work form; sickness reviews; Occupational Health reports</li> <li>• Termination documents</li> <li>• Emails</li> <li>• Mortgage/rent requests</li> <li>• References/Reference requests</li> </ul>	Documents relating to individual's employment at SSDC	Exit interview documents; Documents relating to sickness (apart from anything related to serious illness, stress or work related accidents); Maternity documents (over 6 years old); duplicates of contracts and contract variations; Equal opportunities monitoring; E-Mails; Mortgage/rent requests etc to be destroyed 6 months after employment ceases  Leavers from and tick list; Redundancy details; Sickness documents relating to serious illness, stress or work-related accidents; Maternity documents related to maternity within the last 6 years; Contracts and Contract Variations; Job Descriptions; Starter Forms and tick list; Application forms; Reference/Reference requests; Eligibility to work documentation to be destroyed 6 years after employment ceases	No

	Discipline records	Documentation relating to the discipline of individuals	<p>Informal warning - removed from personal file after 4 months</p> <p>Formal verbal warning - removed from personal file after 6 months</p> <p>Written warning - removed from personal file after 12 months</p> <p>Final written warning - removed from personal file after 24 months</p> <p>Formal disciplinary proceedings will be retained for a total of two years before being destroyed</p>	Yes
	<p>Recruitment file:</p> <ul style="list-style-type: none"> <li>• Recruitment authorisation form</li> <li>• Shortlist form</li> <li>• Weighting Sheet</li> <li>• Selection Day Programme</li> <li>• Application Forms</li> <li>• Correspondence</li> </ul>	Documents relating to the recruitment process	Destroy 6 months after recruitment finalised	No
<b>Payroll</b>				
	Pay records	Documents involved in the administration of remuneration to staff and members of the authority	Destroy 7 years after the conclusion of the transaction	Yes

	Child Care Salary Sacrifice Scheme documents	Documents relating to the administration of the Child Care Salary Sacrifice Scheme	Destroy 7 years after the conclusion of the transaction	Yes
	Cycle Salary Sacrifice Scheme	Documents relating to the administration of the Cycle Salary Sacrifice Scheme	Destroy 7 years after the conclusion of the transaction	Yes
	Expenses records: <ul style="list-style-type: none"> <li>• Claim forms</li> <li>• Receipts</li> <li>• MOT Certificates</li> <li>• Insurance Certificates</li> <li>• Driving Licence details</li> </ul>	Documents involved in the administration of expenses paid to staff and members	MOT and Insurance Certificates; Driving licence details - destroy once new certificate is produced  Destroy claim forms and receipts 7 years after the conclusion of the transaction	Yes
	Pension records	Documents involved in the administration of pension schemes for current and former employees	Destroy 6 years from last pension payment	No
	Car Loans records	Documents involved in the administration of car loans to staff	Destroy 7 years after the conclusion of the transaction	Yes
	Timesheets	Records of hours worked for overtime, stand-by and casual workers purposes	Destroy 7 years after the conclusion of the transaction	Yes

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<b>ICT</b>				
	Staff and Member personal information relating to IT access	Stores staff names, Councillors names, phone numbers, email addresses for use with other systems Can include personal email and contact numbers for use with remote access system	Destroyed after administrative use is concluded	No
	Telephone Directory	Stores staff and some councillor contact names and phone numbers	Destroyed after administrative use is concluded	No
	IT Helpdesk Records	A log of all IT related calls to the IT Helpdesk and follow up tasks for the appropriate Officers This includes breach reporting and information associated with the breaches	Destroyed after administrative use is concluded	No
	Email archive system	Holds all archived emails	Currently not destroyed	Some emails will be required to be kept
	Email system	Holds all current emails	Currently not destroyed	Some emails will be required to be kept
	Secure Email system	Holds email that has been sent securely	Currently not destroyed	Some emails will be

				required to be kept
	Mobile Device Management System	Enables SSDC mobile devices to be managed remotely including location (when working across all devices)	Information is live, the system only allows the user to see the current data	No
	SharePoint	Enables staff to store project documents and information that may be shared as part of secure areas with third parties	Currently not destroyed	Some data will be required to be kept
	Yammer	Provides staff forums, for sale, hobbies pages, team pages and general information relating to the Council It is not intended to be used for personal or case information Could be used for third party access in the future	Currently not destroyed	No
	NETConsent Policy System	Delivers policies or documents or internet links (training) to staff who have a network login	Currently not destroyed	No
	Profile Unity	Stores user settings and configurations There is a small risk of personal or sensitive information being held in the system if a user saved a document to their desktop containing such The information is not accessible through the system	Destroyed after administrative use is concluded	No
	Microsoft Lync	Communication tool SSDC has decided not to record/store Instant Messages sent within the system	Information is live, the system only allows the user to see the current data	No
	Office 365	Online access to Powerpoint, Word etc Office products Document sharing (in use only on a few logins)	Currently not destroyed	Some data will be required to be kept

	OneDrive	Part of O365	Currently not destroyed	Some data will be required to be kept
	Umbraco	Umbraco - Content management system for all SSDC websites (internal and external)	Destroyed after administrative use is concluded	No
	Webmap	Webmap (GIS) Mapping Information System showing addresses (no names) May contain historical antisocial behaviour info	Currently not destroyed	No
	Web Marshall	Web Marshall enables filtering of sites to protect staff and also the ability to run reports of internet activity on our SSDC network		No

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<b>Legal services</b>				
	Debt Case Files	Information and records relating to the process of debt recovery	Where a CCJ has been issued - Destroy 6 years after last action	Yes

	Contract Case Files	Information and documentation relating to contracts including ordinary contracts and contracts under seal	Ordinary contracts - Destroy 6 years after the term of the contract has expired  Contracts under seal - Destroy 12 years after the term of the contract has expired	Yes
	Land/Property Case files including Deed Packets	Information and records relating to the process of land disposal and conveyancing and the making of easements and various other legal transactions undertaken on behalf of SSDC	Destroy 12 years from file closure	Yes
	Planning Agreement Files (s106 Agreements)	Information and records relating to the process of making a planning obligation or legal agreement made under s106 Town and Country Planning Act 1990	Agreement Permanent Offer to Archivist; Other documentation 12 years from date of agreement	Yes
	Local Land Charges Register	Legal documentation relating to local land charges including searches and title investigation	Register is permanent record but individual entries can be removed on request after charge has been discharged	Yes
	Legal Advice	Providing advice to clients and services which are legally privileged relating to all aspects of the legal system	Destroy 2 years after matter is concluded	No
	Bylaws	Documentation relating to the process of making local laws	Bylaws - Permanent	Yes



	Planning Enforcement Register	Legal documentation relating to planning enforcement notices	Register is permanent record but individual entries can be removed on request after enforcement notice has been complied with	Yes
	Contracts Database	Database of all contracts held by Legal Services	Register is kept up to date	No
	Statutory Notices	The process of enforcing building or land regulations		No
	Housing Stock Transfer	Documentation relating to the transfer of the Council's housing stock	Permanent - Offer to Archivist	No
	Maps	Maps of the South Somerset District area	Permanent - Offer to Archivist	No
	Subject Access Requests Records	Information and records relating to processing of SARs	Destroy 2 years from conclusion of request	No
	Records relating to other DP searches <ul style="list-style-type: none"> <li>• s29(3) requests</li> <li>• Domestic Homicide Reviews</li> <li>• Missing Person requests</li> </ul>	Information and records relating to the processing of other DP requests	Destroy 2 years from conclusion of request	No
	Freedom of Information Records	Information and records relating to processing of FOI requests including internal reviews	Destroy 3 years after date of creation	No
	PIAs	Documentation relating to the undertaking of PIAs	Permanent - Offer to Archivist	No

	Fraud Investigation Records	Records relating to the activities relating to the detection, prevention and prosecution of financial irregularity	Where case has gone for prosecution, destroy file 6 years after the conclusion of the transaction  Where case does not go for prosecution destroy file	Yes/No
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Asset Number	Name of Asset	Function	Retention Period	Is the Data Legally Required to be Kept?
<b>Licensing</b>				

	<p>Licensing Act 2003 Records:</p> <ul style="list-style-type: none"> <li>• Premises Licences</li> <li>• Club Premises Licences</li> <li>• Temporary Event Notices</li> <li>• Personal Licences</li> <li>• Notification of Interest</li> </ul>	<p>Information is processed for the purpose of granting, issuing and updating licences issued under the Licensing Act 2003 Information may also be used to prosecute licence holder where conditions of licence are not being met Records also contain details of inspections undertaken by Officers</p>	<p>Premises and Club Premises Licences: Record to be destroyed 2 years after licence has been surrendered Where representations for a licence has been received destroy 3 months from date of decision of committee If decision is taken to appeal destroy representations and case file 7 years after last action</p> <p>Personal Licences: Record to be destroyed 2 years after licence has been surrendered Where applicant has a relevant offence, remove details and all related information as soon as offence is spent Where application has been referred to a Committee to determine whether to grant a licence or not and the Committee reject application, destroy application 3 months from date of decision</p> <p>TEN: Record to be destroyed 2 years after event date or withdrawal of notice Where notice has been refused destroy once administrative use is concluded</p> <p>Notification of Interest: Destroy once notification has ended</p>	<p>Yes</p>
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	<p>Gambling Act 2005 Records:</p> <ul style="list-style-type: none"> <li>• Premises Licence</li> <li>• Club gaming Permit</li> <li>• Club Machine Permit</li> <li>• Prize Gaming Permit</li> <li>• Family Entertainment Centre Gaming Machine Permit</li> <li>• Notification of two or less gaming machines</li> <li>• Occasional/ Temporary Use Notices</li> <li>• Small Society Lottery Registration</li> </ul>	<p>Information is processed for the purpose of granting, issuing and updating licences, permits and registrations issued under the Gambling Act 2005 Information may also be used to prosecute licence holder where conditions of licence are not being met Records also contain details of inspections undertaken by officers</p>	<p>Record to be destroyed 2 years after licence/permit/registration has been surrendered/seized/forfeited/revoked</p> <p>Where Club Gaming Permit or Club Machine Permit has been cancelled by the LA, record must be kept for 10 years from cancellation and can then be destroyed</p>	<p>Yes</p>
	<p>Taxi Licensing Records:</p> <ul style="list-style-type: none"> <li>• Hackney Carriage &amp; Private Hire Driver's Licence</li> <li>• Hackney Carriage Vehicle Licence</li> <li>• Private Hire Vehicle Licence</li> <li>• Vehicle Trailer Licence</li> <li>• Private Hire Operator's Licence</li> </ul>	<p>Information is processed for the purpose of granting, issuing and updating taxi licences Information may also be used for enforcement purposes</p>	<p>Record to be destroyed 2 years after licence has been Retention of non-granted licenses - destroy 21 days after refusal decision is taken unless appeal is lodged with the Magistrates' If Appeal is lodged retain until all appeal provisions have been exhausted</p>	<p>Yes</p>
	<p>Street Trading Consent Records</p>	<p>Information is processed for the purpose of granting, issuing and updating street trading consents Information may also be used for enforcement purposes</p>	<p>Record to be destroyed 2 years after permit has been surrendered/seized/forfeited/revoked</p>	<p>No</p>
	<p>Acupuncture, Tattooing, Ear Piercing,</p>	<p>Information is processed for the</p>	<p>Record to be destroyed 2</p>	<p>No</p>

	Electrolysis & Special Treatments Registration Records	purpose of granting, issuing and updating acupuncture, tattooing, ear piercing, electrolysis & special treatment registrations Information may also be used for enforcement purposes	years after registration has been surrendered/seized/forfeited/revoked	
	Scrap Metal Licensing Records: <ul style="list-style-type: none"> <li>Collectors Licence</li> <li>Site Licence</li> </ul>	Information is processed for the purpose of granting, issuing and updating scrap metal licences Information may also be used for enforcement purposes	Record to be destroyed 2 years after licence has been surrendered/seized/forfeited/revoked	No

Asset Number	Name of Asset	Function	Retention Period	Is the Data Legally Required to be Kept?
<b>Locality</b>				
Currently under review				

Asset Number	Name of Asset	Function	Retention Period	Is the Data Legally Required to be Kept?
<b>Octagon &amp; Westlands</b>				

Currently under review

Asset Number	Name of Asset	Function	Retention Period	Is the Data Legally Required to be Kept?
<b>Performance</b>				
	Performance Monitoring Reporting	Information is collected to check against the Council's Performance Indicators	TEN - 1 year Documents on hard drive Permanent Offer to Archivist	No
	Online survey tool	Account is available to staff who wish to obtain information (personal and non-personal data) from internal and external stakeholders in the form of an online survey	Public consultation - 5 years if development of significant policies and 1 year if development of minor policies	No
	Lean Activity Logs & Reports	Information was collected as part of project to improve service efficiency	Delete once purpose of programme is complete	No
	Performance Finance Documents	Assists with the financial management of the Performance Team	6 years	No

Asset Number	Name of Asset	Function	Retention Period	Is the Data Legally Required to
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				be Kept?
<b>Planning</b>				
Currently under review				

Asset Number	Name of Asset	Function	Retention Period	Is the Data Legally Required to be Kept?
<b>Procurement</b>				
	Returned cheques	When cheques have been issued and returned these are stored until instructed by services as to what should be done	Cheques destroyed after 1 month (Council Tax as an exception)  Paperwork relating to cheques destroyed after 18 months	No
	Management of contracts: <ul style="list-style-type: none"> <li>• MFDs</li> <li>• Stationary</li> <li>• Print Management</li> <li>• Mobile Phones</li> <li>• Fixed Lines</li> </ul>	Information such as Invoices, invoice queries, orders and contract used to manage the contract	Destroy 6 years after the term of the contract has expired	Yes
	Contract Register	Register of all contracts	Updated as necessary	No
	Procurement Cards documentation	Applying and setting up cards, monitoring spend, card numbers	Destroy 6 years after the conclusion of the transaction	Yes

	Corporate Risk Register	Details of the different risks and what actions can be taken to mitigate these risks	Held indefinitely	No
	Recharge systems	Various systems used to monitor device usage for recharge purposes	Held indefinitely	No
	MFDs	Documents that are scanned and/or copied are stored on the MFDs hard drive	Hard drives are industrially wiped at the end of contract	No

Asset Number	Name of Asset	Function	Retention Period	Is the Data Legally Required to be Kept?
<b>Property Services and Engineering</b>				
Currently under review				

Asset Number	Name of Asset	Function	Retention Period	Is the Data Legally Required to be Kept?
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Revenue and Benefits				
	System for calculating and administering housing and council tax benefit	Information is gathered and processed in relation to benefit calculations and the administration of such benefits	Currently under review	
	System for the recovery of Council Tax	Information is processed in relation to the recovery of Council Tax	Currently under review	
	System for the recovery of Business Rates	Information is processed in relation to the recovery of Business Rates	Currently under review	
	System reporting	Reports are run from the iWorld/Northgate systems for monitoring purposes	Currently under review	
	Benefit information	Screen shots are taken from the Customer Information System (CIS) and saved within the EDM CIS is a DWP system and only permitted to look, not to change	Currently under review	
	Discretionary Hardship/ Housing payment administrative spreadsheets	Information monitoring the issue of payments and the write-offs	Currently under review	
	Universal Credit and Single Fraud Investigation Service information spreadsheets		Currently under review	

	Credit reference documentation	Information is obtained to assist with the recovery of overpayments and the tracing of debts	Currently under review	
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Asset Number	Name of Asset	Function	Retention Period	Is the Data Legally Required to be Kept?
<b>Strategic housing</b>				
Currently under review				

Asset Number	Name of Asset	Function	Retention Period	Is the Data Legally Required to be Kept?
<b>Streetscene</b>				
	Records of operational requests and complaints including: <ul style="list-style-type: none"> <li>• Flytipping</li> <li>• Horticulture</li> <li>• Street Cleaning</li> <li>• Car park staffing related issues</li> <li>• Taxi Testing</li> <li>• Fleet-related complaints</li> </ul>	Names, addresses and contact details are collected from those reporting an incident or making a request in order to process that request Information about the 'culprit' may also be collected where action may be taken against that individual e.g. flytipping	Records will be kept for current year plus one additional year	No
	Contract details	Details of contracts where SSDC are the contractors and some details of contractors which SSDC may be used	See Legal's IAR for full contract retention periods Where not covered by the retention periods information will be kept and destroyed after administrative use is concluded	Yes
	Nursery customer details	Details of customers of the nursery used in relation to orders made only and not for direct marketing purposes	Destroyed after administrative use is concluded	No
	Parish Warden details	Details are kept for the Parish Warden Scheme where	Destroyed after administrative use is	No

		environmental schemes and issues can be discussed between Parishes and Streetscene.	concluded Information will be kept as current so warden's details to be deleted once replaced	
	Vehicle Tracking Information	This information is used to track vehicle i.e. to see where the vehicle has been, where it is going and where it is currently The information is also used to monitor drivers for speeding, breaking and erratic driving The information can be viewed in real time or be accessed at a later date	The system holds the tracking information for 3 months	No
	Yeovil Cemetery Records: <ul style="list-style-type: none"> <li>• Plots and ownership ledgers</li> <li>• YDH Foetal Remains information</li> <li>• Mapping and Site information</li> </ul>	This information is used in the process of managing the Cemetery	Permanent - Information is archived for historical purposes	No
	Staff HR Files	Information is a duplicate of the information held at Brympton Way to resolve HR issues without having to get HR file from Brympton	See HR's IAR for full HR retention periods	No
	Sickness Database	Details of when an individual is off work due to sickness This information is processed for the purpose of managing individual's sickness	See HR's IAR for full HR retention periods	No
	Sandbag List	Names and addresses of all the premises where sandbags have been delivered for flood prevention These details are stored to assist	Destroyed after administrative use is concluded	No

		with the management and strategy when an area is effected by flooding		
<b>Fleet Management</b>				
	Vehicle lease and purchase records	Details of the acquisition and disposal of vehicles through lease or purchase	Records to be destroyed 7 years after the disposal of the vehicle	Yes
	Vehicle allocation and maintenance records	Information about the day-to-day maintenance of vehicles including MOTs, defect reports, work sheets and servicing history	Destroy 15 months after the maintenance work has been completed	Yes
	Taxi Testing Documentation	Booking information for taxi vehicle compliance testing	Destroy 15 months after the maintenance work has been completed	Yes
	Vehicle tenders and contracts	Details of the process involved in tendering for a vehicle and/ or a contract	Ordinary Contracts – Destroy 6 years after the disposal of the vehicle Contracts Under Seal – Destroy 12 years after the disposal of the vehicle	Yes
	Driver's details: <ul style="list-style-type: none"> <li>Record of driver's hours</li> <li>Driving licence checks</li> <li>Staff training</li> </ul>	Information is recorded and retained to ensure compliance with driving regulations	Records of driving hours - destroy 12 months after the date of reading Driving licence checks - destroy after 6 months when a new check will be undertaken Training records - destroy 6 years after termination of employment	Yes