

The General Data Protection Regulation

Document Retention Policy

Under the General Data Protection Regulation, all businesses must have a policy which details their 'retention schedules' which means the processes by which they store, review and destroy documentation and include the timescales that the business will retain documents for. You must create your own policy to cover documentation relating to your at need business and also your business generally.

When creating your Document Retention Policy you should include the following sections:

- ✔ Who you intend to cover with the policy: is it only your business or also any businesses that process data on your behalf? e.g. crematoria
- ✔ The individuals involved:
 - Who is responsible for overall data management?
 - Who created the policy?
 - Who is responsible for reviewing/updating the policy?
 - Who is responsible for ensuring adherence to the policy?
- ✔ Why you need records and the relevance of the records you keep
- ✔ Why you need may to retain documents
- ✔ The process for disposing of or destroying documentation
- ✔ How someone reports a concern about the management of documentation
- ✔ Definitions of any key words or phrases you will use

You should then create an appendix containing a retention schedule. This can be done as a list of each type of document you store or you may wish to group them together based on areas of the business for example brochures, company records etc.

You may also wish to include a set of guidance that you would like your employees to consider prior to destroying documentation and a template Certificate of Destruction which should be filled in and stored securely to ensure you have accurate records of the documents you have stored and the circumstances under which they were destroyed. We can provide you with template policy documents and Certificate of Destruction.