**Oxfordshire Health Archives: Guidelines for internal departments of the Oxford Health NHS Foundation on retention and disposal of records**

This guidance is for internal departments wishing to transfer their archives to the Oxfordshire Health Archives (OHA) for long-term preservation of and general access to the records. It assumes that the records under consideration are no longer required for legal or administrative purposes.

Routine destructions should be dealt with in the usual processes. If in doubt please contact Mark Underwood, Head of Information Governance, mark.underwood@oxfordhealth.nhs.uk or Tina Thomas, Health Records Manager/Privacy Officer, tina.thomas@oxfordhealth.nhs.uk

For records not covered by the schedule below, or for any material held in digital form, please ask Oxfordshire Health Archives (OHA) staff for specific advice.

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| **Type of record** | **Action** | **Notes** |
| **MEDICAL**  |  |  |
| Admission books  | Offer to OHA for appraisal |  |
| Birth registers  | Offer to OHA for appraisal  |  |
| Chaplaincy registers  | Offer to OHA for appraisal  |  |
| Death registers  | Offer to OHA for appraisal  |  |
| Discharge registers  | Offer to OHA for appraisal  |  |
| Microfilm/microfiche registers  | Offer to OHA for appraisal  | Original copies only  |
| Post mortem registers  | Offer to OHA for appraisal  |  |
| Ward registers  | Offer to OHA for appraisal  |  |
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| **ADMINISTRATIVE** |  |  |
| Minutes | Offer to OHA for appraisal |  |
| Draft minutes | Destroy (if signed minutes exist) |  |
| Correspondence on key policies, strategies or projects | Offer to OHA for appraisal |  |
| Routine correspondence, copies of circulars, appeals for charitable donations | Destroy |  |
| Title deeds or other documents relating to title, acquisition, disposal or rights over a property  | Offer to OHA for appraisal |  |
| Membership lists, registers, personnel records | Offer to OHA for appraisal  |  |
| Annual reports of group activities | Offer to OHA for appraisal  |  |
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| **BUILDING AND FACILIITES**  |  |  |
| Building plans  | Offer to OHA for appraisal |  |
| Estate surveys and photographs  | Offer to OHA for appraisal |  |
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| **FINANCIAL** |  | If more than 7 years old |
| Annual audited accounts | Offer to OHA for appraisal |  |
| Other subsidiary financial paperwork, draft accounts, monthly account reconciliations | Destroy |  |
| Insurance policies | Offer to OHA for appraisal  |  |
| Bank statements | Offer to OHA for appraisal  |  |
| Paying-in books | Offer to OHA for appraisal  |  |
| Cheque book stubs | Destroy |  |
| Invoices, receipts and vouchers | Destroy |  |
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| **PUBLICITY** |  |  |
| Programmes | Offer to OHA for appraisal |  |
| Posters | Offer to OHA for appraisal  |  |
| Scrapbooks | Offer to OHA for appraisal  |  |
| Newsletters or magazines | Offer to OHA for appraisal  |  |
| Photographs | Offer to OHA for appraisal  |  |
| Presscuttings | Offer to OHA for appraisal  |  |
| Press releases | Offer to OHA for appraisal  |  |
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| **MAJOR PROJECTS, CAMPAIGNS OR INITIATIVES** |  |  |
| Minutes, accounts, tenders, specifications, plans, buildings plans relating to each project | Offer to OHA for appraisal | Project files should be weeded prior to transfer, to remove ephemeral or duplicate material |
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| **OTHER**  |  |  |
| Artefacts  | Offer to OHA for appraisal |  |
| Historical medical equipment  | Offer to OHA for appraisal |  |
| Uniforms  | Offer to OHA for appraisal |  |
| Photographs /negatives | Offer to OHA for appraisal | We reserve the right to remove items from their frames for preservation reasons |

To arrange an appraisal of selected records that are highlighted for permanent retention, please contact the archives department on the contact details below. Please ensure material is boxlisted prior to transfer.

**We are unable to accept collections without prior arrangement and notice.**

Lucy Barrell, Archivist

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