

LG Inform Plus

Records Retention Help Guide



February 2017

This document outlines the process behind utilising the Records Retention function in LG Inform Plus.

What is it?

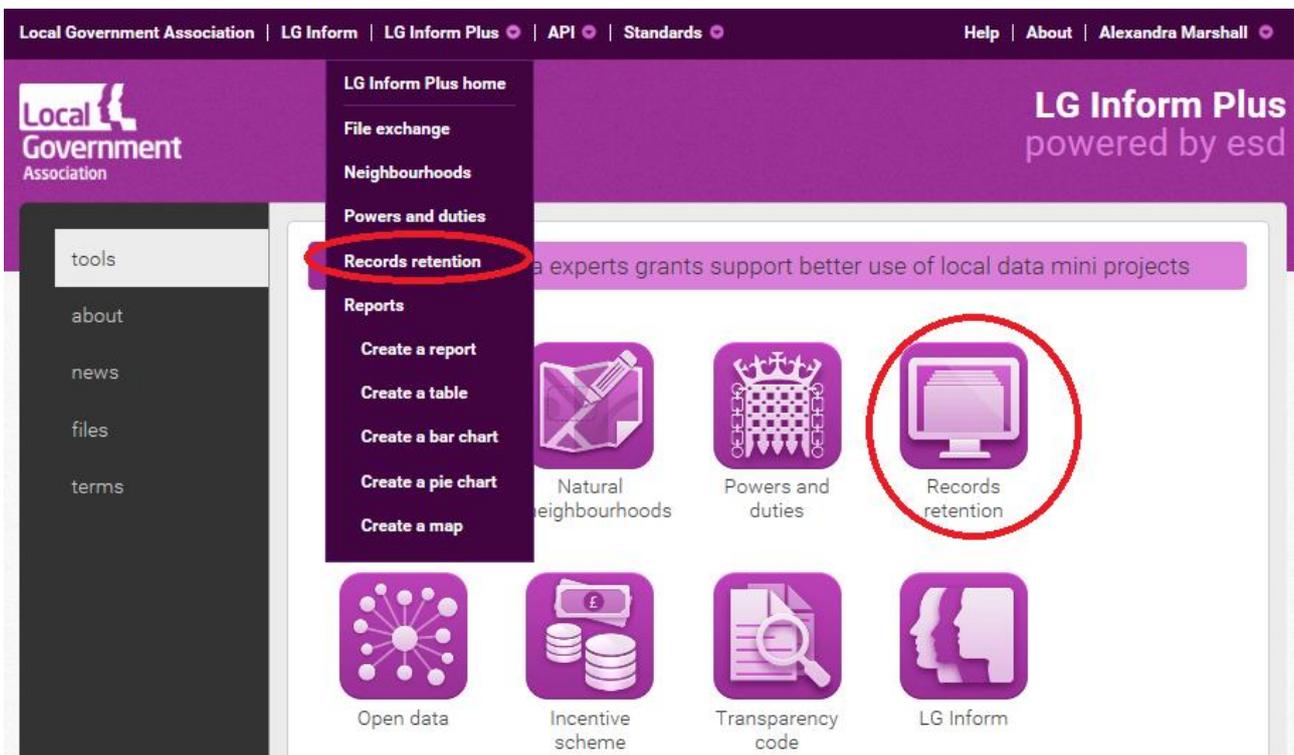
Councils are required by law to keep records for a certain period of time, depending on the category of the record. As the costs of storage, monitoring digital security and version controls, compliance with Freedom of Information (Fol) requests and the possibility of hefty fines can be considerably high, this section of the web site is designed to provide guidance to those dealing with records retention.

LG Inform Plus provides retention guidance for every customer centred service delivered by Local Government, as well as some internal services. Produced in partnership with Kent County Council's Legal Services team, the information ensures compliance with Section 12 of the Lord Chancellor's Code of Practice and can also help authorities meet business needs. It is maintained against a changing legislative framework and has the potential to save Local Government substantial costs, time and expertise.

Provided you are a subscribing authority, the following steps will take you through the records retention pages in LG Inform Plus.

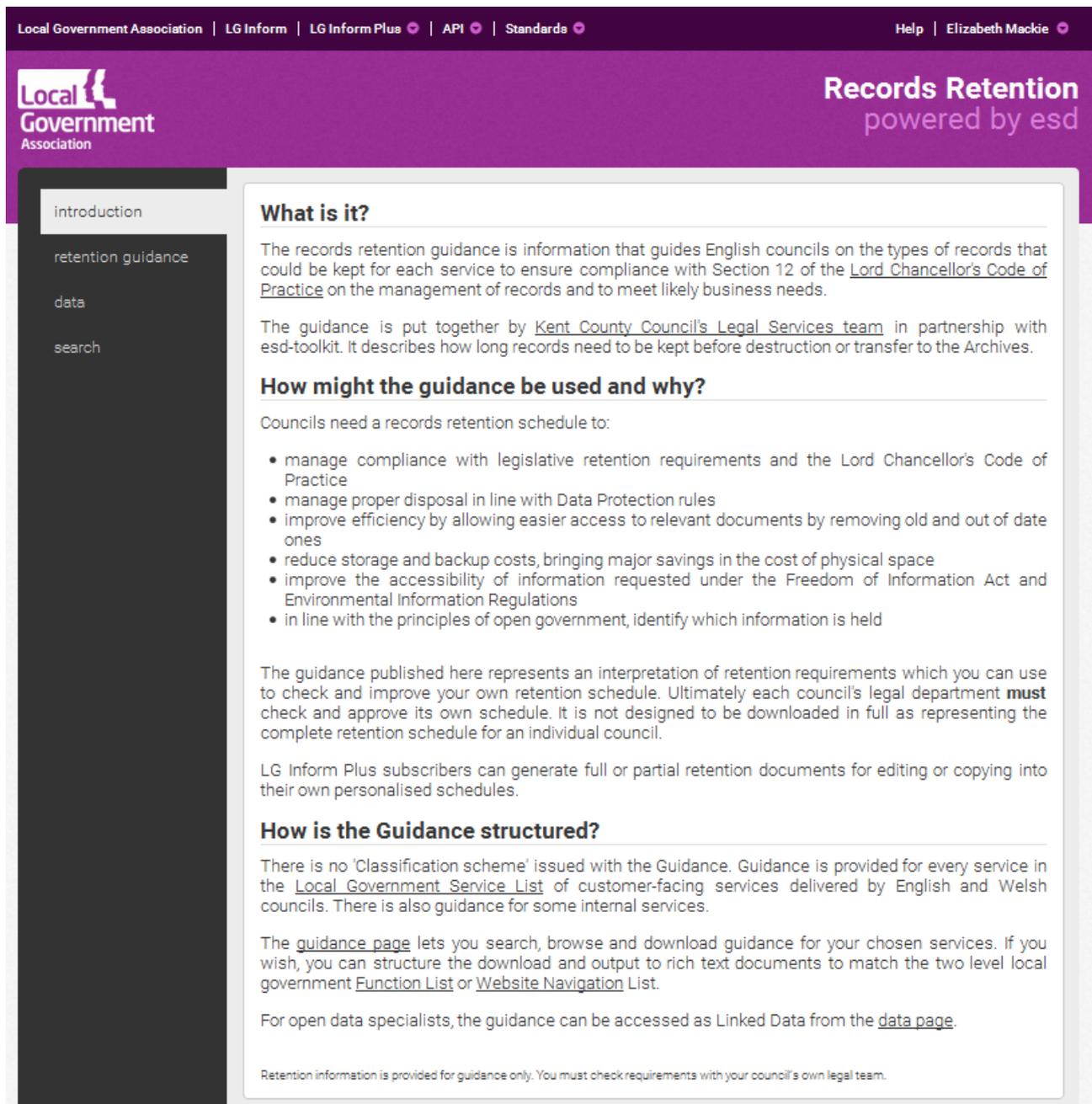
Utilising Records Retention

To utilise this tool, you will need to sign in to LG Inform Plus <http://about.esd.org.uk/>. Once you have signed in, click on the 'records retention' icon on the homepage, shown in the image below or via the drop down option.



Introduction

The default page for selecting records retention will provide you with introductory information, such as a further explanation of what it is, tips on how best to utilise the guidance and how the guidance is structured.



By selecting 'retention guidance' from the list of options on the left hand side of the screen, you will see the below page displayed. Please refer to the image below for an explanation of the functionality of the page.

Local Government Association | LG Inform | LG Inform Plus | API | Standards | Help | Elizabeth Mackie

Local Government Association **Records Retention**
powered by esd

introduction
retention guidance
data
search

Retention guidance
Sort guidance and show me: **by function** / **everything**

Retention requirement
 All legal or business requirements
 Only legal requirements
 Only business requirements

Download as CSV | Download as RTF

Advice and benefits - Advice and welfare rights

SERVICE	RETENTION	RETENTION
190 Benefits advice and assessment	All records relating to the work of benefit advisors who offer benefit assessment and provide advice about entitlement to welfare benefits to individuals in receipt of benefit or claiming benefit.	
328 Bereavement support	All records relating to the provision of support and advice to relatives about the arrangements that need to be made after a bereavement	
352 Credit unions	All records relating to the creation and management of Credit Unions	
651 Debt counselling	All records relating to the provision of debt counselling services to citizens	
1520 Debt enforcement	All records relating to debt enforcement	
1520 Debt enforcement	Case files relating to debt recovery	
671 Funeral payment	All records relating to the payments to assist with the payment for a funeral	

Use these filters to narrow down the records shown in your search; to show either those which have a legal requirement or those with only a business requirement.

Download all the information as a CSV or a RTF file, including live links to legislation and timescales for retention.

The briefcase icon indicates that there is a business requirement to keep the documents.

Click on the header to see how this service aligns with other services.

The hammer icon indicates there is a legal requirement to keep the documents.

Click on the string of text to open a new page with full details of that record.

You can scroll through the whole list of record types on this page.

Retention guidance

The first filter, 'sort guidance' allows you to filter the retention guidance by function type, web navigation, external or internal service by using the top drop down box.

The screenshot shows the 'Records Retention' web application interface. At the top, there is a navigation bar with links for 'Local Government Association', 'LG Inform', 'LG Inform Plus', 'API', and 'Standards'. On the right, there is a 'Help' link and the name 'Elizabeth Mackie'. The main header features the 'Local Government Association' logo on the left and the text 'Records Retention powered by esd' on the right. A dark sidebar on the left contains navigation links: 'introduction', 'retention guidance' (highlighted), 'data', and 'search'. The main content area is divided into two columns: 'Retention guidance' and 'Retention requirement'. Under 'Retention guidance', there is a 'Sort guidance and show me' section with a dropdown menu currently set to 'by function'. Other options in the dropdown are 'by web navigation', 'by external service', and 'by internal service'. Below this are two buttons: 'Download as CSV' and 'Download as RTF'. The 'Retention requirement' column shows three filterable options: 'All legal or business requirements', 'Only legal requirements', and 'Only business requirements'. Below these filters, there is a section titled 'Advice and benefits - Advice and welfare rights' containing a table of retention guidance items.

Service	Retention Requirement
190 Benefits advice and assessment	All records relating to the work of benefit advisors who offer benefit assessment and provide advice about entitlement to welfare benefits to individuals in receipt of benefit or claiming benefit.
328 Bereavement support	All records relating to the provision of support and advice to relatives about the arrangements that need to be made after a bereavement.
352 Credit unions	All records relating to the creation and management of Credit Unions.

The second filter, 'and show me', allows you to be more specific about what retention guidance you are seeking. However, the second filter will only be available to populate if the user has selected either 'by function' or 'by web navigation' in the 'sort guidance' filter.

introduction
retention guidance
data
search

Retention guidance

Sort guidance and show me: by function everything

Download as CSV

Advice and benefits

- Business and employment
- Community safety
- Education and learning
- Environmental protection
- Government, citizens and rights
- Health and social care
- Housing
- Leisure and culture
- Licences, permits and permissions
- Marine and waterway services
- Planning and building control
- Transport and highways

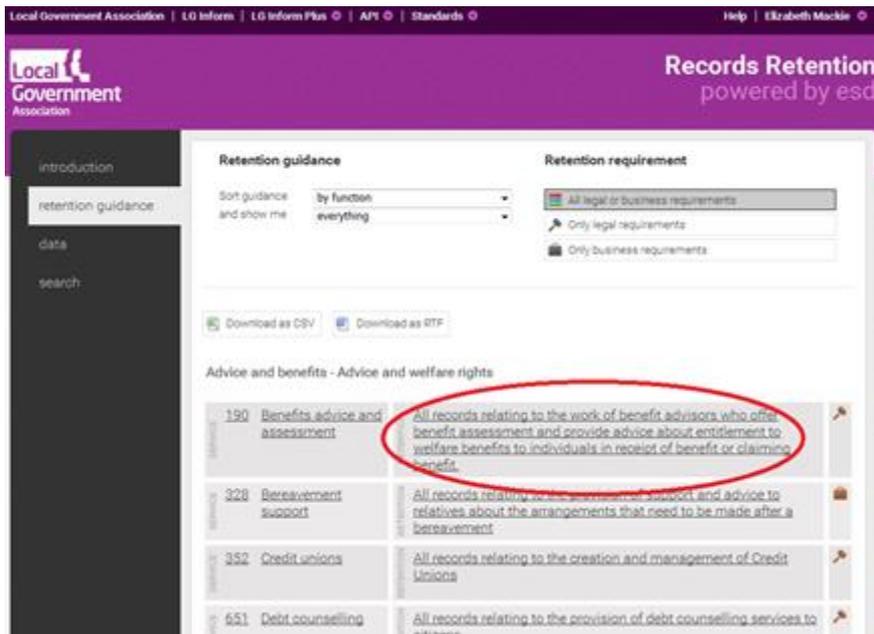
190	Benefits assessment	All records relating to the work of benefit advisors who offer benefit assessment and provide advice about entitlement to welfare benefits to individuals in receipt of benefit or claiming benefit.	📌
328	Bereavement support	All records relating to the provision of support and advice to relatives about the arrangements that need to be made after a bereavement	📁
352	Credit unions	All records relating to the creation and management of Credit Unions	📌

Retention requirement

- All legal or business requirements
- Only legal requirements
- Only business requirements

When you download a CSV or RTF now it will contain only your filtered list.

After locating the relevant record type, click on the string of text next to the title, which will take you to a page displaying all the necessary data for that record type.



Guidance for Benefits advice and assessment (service 190)

All records relating to the work of benefit advisors who offer benefit assessment and provide advice about entitlement to welfare benefits to individuals in receipt of benefit or claiming benefit.

Impact level	<u>IL2</u>	Contains personal information	Yes
Legal requirement	Yes	Retain permanently	No
Archive	No		

Legislation [Limitation Act 1980 \(Section 2\)](#)

Retention Retain from year records created for 6 years.

URI for this guidance <http://retention.esd.org.uk/retention/147>

Benefits advice and assessment (190) service
is contained within

- Advice and welfare rights function**
- Benefits navigation**

[SPARQL query for this item](#)

Retention information is provided for guidance only. You must check requirements with your council's own legal team.

On this page you can see a link to the legislation, information on the length of time you need to keep the record and further information.

Data

Located on the tool bar on the left hand side of the screen, this option is intended for the more technical users who are interested in writing their own SPARQL queries. Users can construct queries to extract the retention data of interest from the LG Inform Plus database, and format the output as required.

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Local Government Association

Records Retention powered by esd

introduction

retention guidance

data

search

Data

You can query our SPARQL database by using our endpoint: <http://sparql.esd.org.uk/ds/query>

What is this?

All guidance information is freely available as Open [Linked Data](#) that can be queried using the SPARQL query language.

Retention data is licenced under the [Open Government Licence](#) and must be attributed to the [esd-toolkit programme](#).

LG Inform Plus subscribers can use the [guidance page](#) to browse guidance and download it in a variety of formats.

Example queries

Retrieve all services

```
PREFIX xsd: <http://www.w3.org/2001/XMLSchema#>

SELECT ?id ?title
WHERE
{
  ?s a <http://def.esd.org.uk/Service> .
  ?s
  <http://www.w3.org/2004/02/skos/core#prefLabel>
  ?title .
  ?s <http://purl.org/dc/terms/identifier> ?id
}
ORDER BY xsd:integer(?id)
```

Get id and description of service retentions

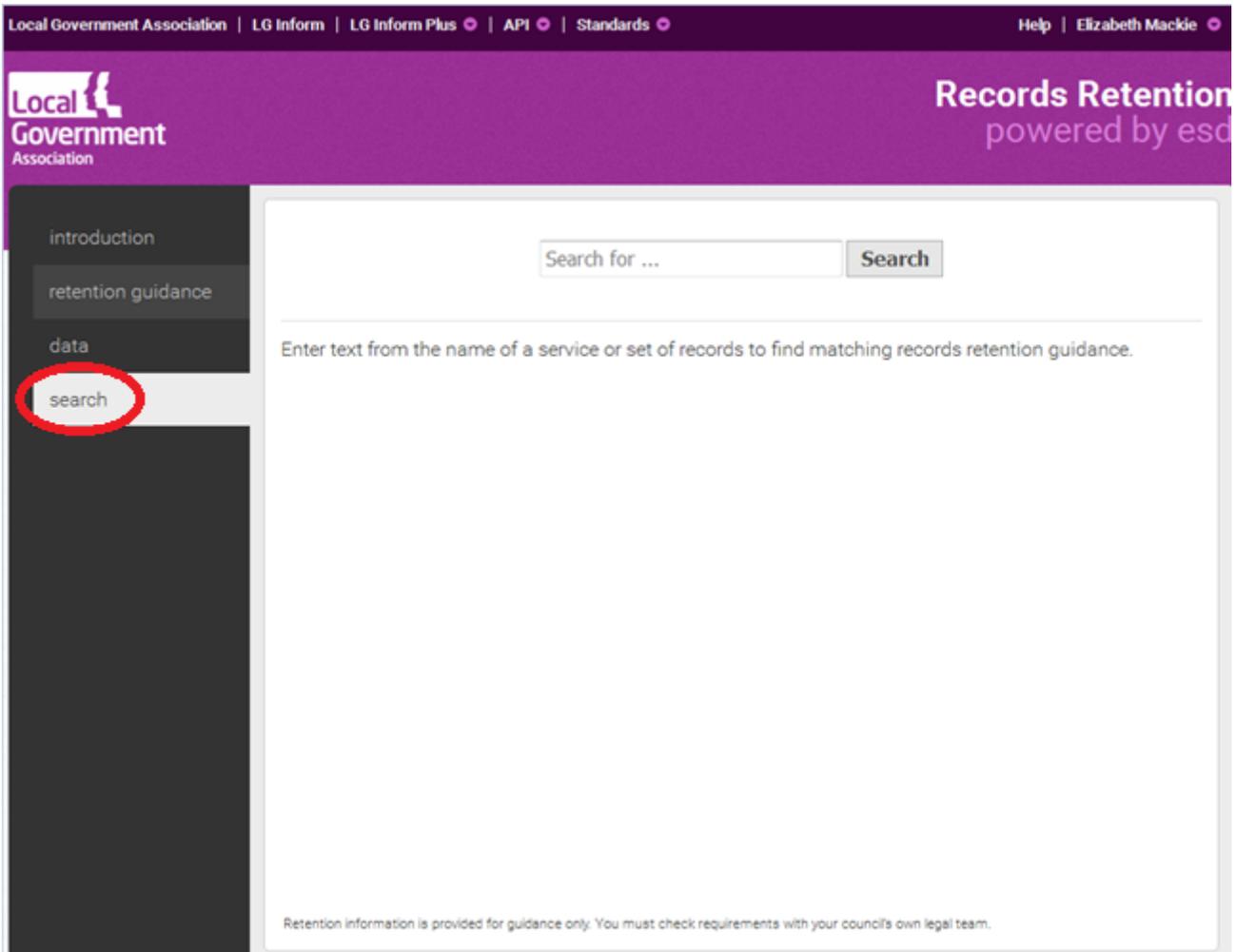
```
PREFIX xsd: <http://www.w3.org/2001/XMLSchema#>

SELECT ?id ?description
WHERE
{
  ?s a <http://def.esd.org.uk/Retention> .
  ..
```

The support team are always happy to assist users who are interested in using this function.

Search

The final option on the tool bar on the left hand side of the screen allows users to conduct open searches of all the records stored in the LG Inform Plus Record Retention database.



Please note, retention information is provided for guidance only. You must check specific requirements with your council's own legal team.

For more information please contact

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We consider all requests on an individual basis.