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Records Retention Schedule

Under the General Data Protection Regulation storage limitation principle (["GDPR" \(Art 5\(1\)\(e\)\)](#)) it is necessary to have a clear schedule which a business follows when making decisions about data retention to ensure that personal data are not retained longer than necessary, in relation to the purpose for which such data is processed.

This schedule must not be used in isolation, it must be used with the Privacy Policy.

1. **Client Contact and Demographic Information**

- Retention Period: 7 years after the last session
- Reason: Required for accurate record-keeping, billing, and contact purposes.

2. **Assessment and Treatment Plans**

- Retention Period: 7 years after the last session
- Reason: Provides a historical perspective on the client's progress, therapeutic goals, and strategies.

3. **Session Notes and Progress Reports**

- Retention Period: 7 years after the last session

- Reason: Essential for tracking the client's treatment journey, interventions, and outcomes.

4. Correspondence and Communications

- Retention Period: 7 years after the last session
- Reason: Maintains a record of important communications between therapist and client, including emails and letters.

5. Release of Information and Consent Forms

- Retention Period: 7 years after the last session or as required by law
- Reason: Documents permissions granted by the client for communication with other parties or disclosures of information.

6. Risk Assessment and Safety Plans

- Retention Period: 7 years after the last session
- Reason: Retained in case of future reference or if necessary for legal reasons.

7. Financial Records and Invoices

- Retention Period: As required by applicable tax laws and regulations
- Reason: Ensures accurate financial records for billing, tax, and audit purposes.

8. Termination and Discharge Summaries

- Retention Period: 7 years after the last session
- Reason: Provides a summary of the client's progress and the reasons for termination.

9. Supervision and Consultation Notes (if applicable)

- Retention Period: 7 years after the last session

- Reason: Maintains a record of professional collaboration and guidance received.

10. Consent and Authorization Forms

- Retention Period: 7 years after the last session
- Reason: Ensures that legal and ethical requirements for informed consent are met.

When records have reached the end of their retention period, they will be properly and securely destroyed to ensure confidentiality is maintained.