

Customer and Local Services

Retention periods for information processed by the **Pensions and Care Hub – Long-Term Care Team**

Records	Retention Period	Action by Department	Action by Jersey Archive
Application Forms (claimant deceased before claim open)	1 year and 1 day	Scan to information system and destroy physical copy	None
Award Letters	Until scanned to information system	Scan to information system and destroy physical/L drive copy	None
Booklets	Until superseded	Transfer to Jersey Archive	Archive
Daily Reports: - Over limits (payments over a certain amount) - Manual payments - Manual adjustments	2 years	Destroy	None
Electronic Bank Statements	1 month	Destroy	None
Invoices	2 years	Destroy	None
LTC Application forms and supporting documents	Until scanned to information system	Scan to information system and destroy physical copy	None
LTC CRM system data	5 years after DoD	Destroy	None
Policy and procedural documents	Whilst in use	Copy to Jersey Archive	Archive
Template Letters	Until superseded	Destroy	None
Templates of all forms and associated documents	Whilst in use	Copy to Jersey Archive	Archive
Weekly report - Suspended claims	2 years	Destroy	None
Weekly report - Overlapping benefits (SOJ Benefit change report)	2 years	Copy saved in information system (LTC folder)	None
Post for Long-Term Care	20 working days	Destroyed	None

* Data held indefinitely due to inability to delete from current information system

Reviewed August 2023