Customer and Local Services
Retention periods for information processed by the **Work & Family Hub** - **Back to Work Team**

Records	Retention Period	Action by Department	Action by Jersey Archive
Incentives			
Guidelines	Until superseded by newer version	Delete previous version from Information system. Copy of new version to be submitted to Jersey Archive on production	Archive
Payment schedules	5 years	Delete old data from spreadsheet	
Exception register	2 years	Delete old data from spreadsheet	
Client paperwork per incentive by employer	2 years	Delete from Information system	
Eligibility spreadsheet	2 years	Delete old data from spreadsheet	
Enablement Fund			
Guidelines	Until superseded by newer version	Delete previous version from Information system. Copy of new version to be submitted to Jersey Archive on production	Archive
Invoices and receipts	Retain until details input on payments spreadsheet	Destroy	
Completed application forms / requests	Retain until details input on spreadsheet	Destroy	
Payment schedule (Enablement Fund Register)	2 years	Delete old data from spreadsheet	
Client Information			
Client jobseeking documents including placement agreements and certificates	1 year after last contact	Delete from Information system. Copy of updated template forms to Jersey Archive.	Archive
Jobseeking requirement exception forms	Until exit period expires	Destroy	
Exemption spreadsheet	Updated weekly	Previous version deleted from Information system	
Medical questionnaires	Retain until exempt period complete	Destroy	
Medical questionnaire tracker	1 year	Delete old data from spreadsheet	
LT exemption tracker	1 year	Delete old data from spreadsheet	

Customer survey information	Retain for 1 year	Any identifiers anonymised after action taken to resolve any issues	
Emails in Outlook - to be saved into the relevant client folder and then deleted	1 year after last contact	Delete from Information system	
Job start spreadsheets and dashboard	Delete personalised data yearly'	Retain indefinitely as is anonymised. Copy of anonymised data to Jersey Archive on an annual basis	Archive
Back To Work Schemes – General			
Caseload review spreadsheets	1 month	Delete from Information system	
Weekly caseload tracker	1 year	Delete from Information system	
Management Reports	Kept indefinitely	Retain indefinitely as is anonymised. Copy to Jersey Archive on an annual basis	Archive
Scheme, programme or service information	Retain until scheme closed or delete when updated / superseded	Delete previous versions from Information system or when scheme closes. Copy to Jersey Archive when scheme closes	Archive
Course outlines	1 year	Delete from Information system	
Project plan template	Until superseded by newer version	Delete previous version from Information system	
Programme survey templates	Until superseded by newer version	Delete previous version from Information system. Copy of new version to be submitted to Jersey Archive on production	Archive
Programme trackers	1 year	Delete old data from spreadsheet	
Short Term Incapacity Allowance (STIA) and appointment tracker	Retain until client becomes Actively Seeking Work (ASW)	Delete old data from spreadsheet	
Programme evaluation reports	3 years	Delete from Information system	
Recorded telephone calls	14 days	All calls automatically deleted after 14 days by call monitoring system	
Back To Work Schemes – Foundations			
Incident & near miss log	Until end of scheme	Delete from Information system at end of scheme	
Attendance registers and payment schedules	1 year after completing scheme	Delete old data from spreadsheet	
Risk assessments and Health & Safety information	For duration of project or until superseded	Delete from Information system when superseded or on completion of a project	
Client risk assessments	1 year after contact ended	Delete from Information system 1 year after last contact	

Budget info	2 years	Delete from Information system	
Project reports and photos	Copy to Jersey Archive after 2 years	Copy to Jersey Archive after 2 years	Archive
Jersey Employment Trust (JET)			
JET referral spreadsheet	Retain for current year	Delete from Information system	
Weekly attendance reports	1 year	Delete from Information system	
Held on Monthly performance reports	3 years	Delete from Information system	
Template JET sanction letters and referral form	Until superseded by newer version	Delete previous version from Information system. Copy of new version to be submitted to Jersey Archive on production	Archive
Management of Services and Staff			
Meeting agendas & minutes	1 year	Delete from Information system	
Back To Work business plans and updates	3 years	Delete from Information system. Copy of new version to be submitted to Jersey Archive on production	Archive
Call monitoring system staff contacts and numbers	Until superseded by newer version	Delete previous version from Information system	
Business continuity contact information	Until superseded by newer version	Delete previous version from Information system	
Continuous Improvement tracker	3 years	Delete old info from Information system	
Continuous Improvement / Lean project docs and meeting notes	For 1 year or until end of project	Delete from Information system	
Customer Service survey questionnaires	Until superseded by newer version	Delete previous version from Information system. Copy of new version to be submitted to Jersey Archive on production	Archive
Customer Service survey results	1 year	Delete from Information system	
Customer service summary data results	3 years	Delete from Information system Copy to Jersey Archive	Archive
Customer Service action plans	Until superseded by newer version	Delete previous version from Information system Copy to Jersey Archive	Archive
Monthly Review templates	Until superseded by newer version	Delete previous version from Information system. Copy of new version to be submitted to Jersey Archive on production	Archive
Observation templates	Until superseded by newer version	Delete previous version from Information system. Copy of new version to be	Archive

		submitted to Jersey Archive on production	
Observation summary data	3 years	Delete old data from Information system	
Skills audit template	Until superseded by newer version	Delete previous version from Information system. Copy of new version to be submitted to Jersey Archive on production	Archive
Professional Development Review (PDR) role objectives templates for Back to Work (BTW) roles	Until superseded by newer version	Delete previous version from Information system. Copy of new version to be submitted to Jersey Archive on production	Archive
Performance Standards for Back to Work roles	Until superseded by newer version	Delete previous version from Information system	
Back to Work recruitment information	Until superseded by newer version	Delete previous version from Information system	
Back to Work role job descriptions	Until superseded by newer version	Delete previous version from Information system	
The big word usage log	Retain info for 2 years	Delete old data from Information system	
Advisor skills resources	Until superseded by newer version	Delete previous version from Information system	
Better Off In Work calculator	Until superseded by newer version	Delete previous version from Information system	
Programme planning docs	Retain until new service / programme is operational	Delete from Information systems Copy to Jersey Archive	Archive
Risk			
Risk sampling reports	3 years	Delete from Information system	
Data samples	Retain until report signed off	Delete from Information system	
Management Information (MI) & Analysis			
All Weekly/ Monthly Reports from Business Enablement Team	1 year	Delete from Information system	
Analyst Tools and Lists	Retain until superseded / replaced by MI	Delete from Information system	
Errors Query Log	1 year	Delete from Information system	
Employment Line Data Check	1 month	Delete from Information system	
Sanctions			
Sanctions logs	1 year for logs with client data. Ongoing for numerical data	Delete old client data from Information system. Copy of Sanction numbers to be submitted to Jersey Archive on an annual basis	Archive

Breach 3 information (on individual clients)	1 year	Delete old data from Information system	
Weekly non-attendance log	1 month. No longer needed when MI system in place	Delete old data from Information system	
Reconsideration master record	1 year	Delete old data from Information system	
Sanction letters	Associate to Information system *	Deleted monthly once scanned to information system	
Sanctions inbox / emails	1 year	Delete from Outlook	
Redundancies			
Credit decisions spreadsheet	2 years	Delete old data from spreadsheet	
Training			
Client Attendance on Dante	Deleted when de-registered		
Course proposals & Materials	Retain indefinitely	Copy of new version to be submitted to Jersey Archive on production	Archive
List of Courses	Retain indefinitely	Archive when superseded by new versions annual review	Archive
Dante System user guide training notes	Indefinitely		
Focus Groups	2 years	Delete from system and transfer to Jersey Archives	Archive
Training Plans	2 years	Delete from system	
Preply	1 year	Delete from system	
Training Provider contracts	Until expiry or when superseded by new training contracts documents (annually)	Delete from system	
List of training providers	1 year	Review annually and send list to Jersey Archive. Delete any training providers no longer used after 12 months.	Archive
Training Templates	Until superseded by newer version	Archive when superseded by new versions annual review	Archive

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