Retention Schedule- PartnershipOne- Customer Services

Note: This Retention Schedule applies to all data held in any format (i.e. paper, electronic etc)

FUNCTION	Description of	Location(s)	Retention Period	Justification	Personal Data	Notes
	Types of Records		and Action			
Customer Service	Telephone	8x8 telephony	Automatic	Business	Can include both	Compliant with
	recordings	system	deletion after 6	requirement	personal and	retention
			months	which is adequate,	sensitive personal	schedule with
				necessary and not	data including	automated
				excessive	name, NINO,	processes in place
					address, contact	to delete data
					details, financial	once retention
					information,	limit has been
					health	reached.
					information as	Retention
					required to	schedule under
					confirm identity	review to ensure
					and resolve	it meets business
					customer	needs of all
					enquiries	departments but
						is not excessive.
Customer Service	Incoming	Outlook	Manually deleted	Business	Can be direct	Compliant with
	customer emails		once the email	requirement	email or online	retention
			has been replied	which is adequate,	form via the	schedule with
			to	necessary and not	council website	automated
				excessive	which reaches us	processes in place
					in email form and	to delete data
					can include both	once retention

					personal and	limit has been
					sensitive personal	reached.
					data including	
					name, NINO,	
					address, contact	
					details, financial	
					information,	
					health	
					information as	
					required to	
					confirm identity	
					and resolve	
					customer	
					enquiries	
Customer Service	Replies to	Outlook	Automatic	Business	Can include both	Compliant with
	customer emails		deletion after six	requirement	personal and	retention
			months	which is adequate,	sensitive personal	schedule with
				necessary and not	data including	automated
				excessive	name, NINO,	processes in place
					address, contact	to delete data
					details, financial	once retention
					information,	limit has been
					health	reached.
					information as	
					required to	
					confirm identity	
					and resolve	
					customer	
					enquiries	

Customer Service	Letters to	M365	Two years- review	Business	Personal data-	Compliant with
	customers- either			requirement	name, address	retention
	advising they are			which is adequate,	and potentially	schedule with
	subject to a time			necessary and not	reference number	manual processes
	limited ban from			excessive		in place to review
	contacting us by					and delete data if
	certain methods					appropriate, once
	or warning them					retention limit has
	this will happen if					been reached.
	their behaviour					
	does not change					