

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

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

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