

Customer and Local Services

Retention periods for information processed by the **Work & Family Hub – WorkWell**

Records	Retention Period	Action by Department	Action by Jersey Archive
Template of 'Return to Work' plan. Template for GP referral form.	Whilst in use	Transfer a copy to Jersey Archive	Archive
Documents which support a case	Until scanned to information system	Destroy physical copy	None
Customers Case and all associated documents on CRM	5 years from the case closure date	Destroy Record	None
Emails to WorkWell inbox about individual cases	Whilst in use	Delete once filed into CRM.	None
Generic email to WorkWell inbox	6 months	Delete	None
Access to work Documents	Release form - 5 years. Tracker - indefinite	Delete from L Drive	None