

Intercom Trust GDPR Retention Schedule

The following is the schedule of retention, destruction and deletion of records that lays out what is kept and for how long based on the following NHS Records Management Code of Practice 2021.

Records	Details	Who is responsible	Retention	Where is this evidenced?
Accident book	Record of any reportable injury, over-three day injury, disease or dangerous occurrence	Health and safety lead	RIDDOR 8 years and accident books 10 years	Governance records master
Client records	Records or logs of: • helpline calls • meetings • emails (deleted from email account after one week) • texts • social media contacts • third party contacts (other agencies and or/family) • counselling records • psychology records NB. We keep the records of children and young people under the age of 18 years until their 25 th or 26 th birthdays	HSA Team	IF ADULT: 8 years from last contact (6 years from case auto-closed) IF CHILD: Until 25 th or 26 th birthdays	Client records master
	Referrals not accepted	HSA Team	2 years	Client records master

Corporate Governance records (Board of Trustees)	Trustee and board meetings Policies – electronic record Serious incidents	CEO and Trustees	Up to 20 years Up to 20 years 20 years	Trustee records master
Estates		CEO and Trustees	3 years after occupation ceases	Trustee records master
Data Protection Impact Assessments (DPIAs)		CEO and Trustees	6 years after completion of use of system	
Finance	Final audited accounts Staff salaries, superannuation, payroll for ETs Other financial things	CEO and Trustees	20 years 10 years 3 years	Trustee records master
Freedom of Information (FOI) and Subject access (SAR) requests	From clients, other service users, staff and trustees	Data Protection Officer or relevant point of contact	3 years after closure of requests	In the relevant record master: • Client records master • Other service user records master • Staff records master • Trustee record master
Legal	Legal complaints	CEO and Trustees	10 years	Governance records master
Contacts	Opt- In • Directory	Office Manager	Only when consent is given	Governance records master

	People who access Intercom's offices to hold meetings			
Directory and room hire contacts		Office Manager	Only when consent is given	Governance records master
Procurements (Funding Contracts)		CEO and Trustees	6 years after end of contract	Governance records master
Staff records	Trustees details	Chair of Trustees	6 years after staff leave	Staff records master
	Employed Staff records	CEO	6 years after staff leave (Timesheets 2 years)	Staff records master
	Employed Staff Summary	CEO	Until 75 th Birthday	Staff records master
	Students on Placement	Deputy Director	6 years after staff leave (Timesheets 2 years)	Staff records master
	Volunteer Counsellors	Deputy Director and Counselling Co-ordinator	6 years after staff leave (Timesheets 2 years)	Staff records master

Client filing and archiving system

	NB. Children and young people's records (under 18) are kept until their 25 th or 26th birthdays so check this first and then file in appropriate section
Last contact in 2025	Destroy in 01/34
Last contact in 2024	Destroy in 01/33
Last contact in 2023	Destroy in 01/32
Last contact in 2022	Destroy in 01/31
Last contact in 2021	Destroy in 01/30
Last contact in 2020	Destroy in 01/29
Last contact in 2019	Destroy in 01/28
Last contact in 2018	Destroy in 01/27
Last contact in 2017	Destroy in 01/26
Last contact in 2016	Destroy in 01/25
Last contact in 2015	Destroy in 01/24
Last contact in 2014	Destroy in 01/23
Last contact in 2013	Destroyed in Confidential Shredding
Last contact in 2012	Destroyed in Confidential Shredding
Last contact in 2011	Destroyed in Confidential Shredding
Last contact in 2010	Destroyed in Confidential Shredding

Dates for the destruction of records

The start of the second week of January each year, in each office location.