

Surrey County Council Customer Services Retention Schedule

Ref No	Description	Legal Basis	Retention	Action at End of Retention	Contains Personal Information	Protectively Marked?	Notes/Access
CUS1.0	Customer Relations Team	-	-	-	-	-	-
CUS1.0.1	Comments & Compliments	-	2 years from last active contact	Secure Disposal	Yes	Protectively Marked	Good business practice, could become a complaint Retain: anonymised copies for statistical data on volume and type for 10 years
CUS1.0.2	Complaint records: stage 1, stage 2 and LGO	-	3yrs from date complaint closed* *From date of final report issued/final piece of correspondence response sent to complainant/LGO.	Secure Disposal	Yes	Protectively Marked	Retain: anonymised copies of complaints of particular interest. Anonyo2 (i)2.6 (s)-2 (e87(ed c)-2 (oaTony)8.(o2 (i)2.9t)-6.7 e re W.e r relevant to more recent complaint 2. subject to legal action 3. Ongoing FOI/DP/EIR complaint with ICO 4. Complex complaint/challenging behaviour – reasonable discretion can be used to retain longer by agreement with CRM
CUS1.0.3	Complaints relating to Children in care	-	Date of birth of Child + 75 years	Secure Disposal	Yes	Official - Sensitive	-
CUS1.0.4	Unreasonable behaviour correspondence where formal notification given of decision to manage contact	-	12 months from date issued. 12 months from date of review	Secure Disposal	No		Exception: Where a customer is exhibiting a pattern of repeated behaviour and/or has ongoing complaints, information requests etc. Discretion applied to retain longer with agreement of the Customer Relations Manager
CUS1.0.5	Guidance & standards for external use	-	Until superceded +2 yrs	Secure Disposal	No	Marked	Relates to any standards/guidance externally published with regard to complaints procedure,process, handling and guidance. Policy on complaints from the public is also an integral part of the Code of Corporate Governance which is covered by a separate retention policy.
CUS2.0	Contact Centre	-	-	-	-	-	-
CUS2.0.1	Customer Relationship Management Database (CRM)	-	5 yrs (from last active contact)	Secure Disposal	No	Marked	Good business practice, insight and data analysis to improve services.

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CUS2.0.2	Call recordings	-					