




Document & Data Retention Policy – 2024

Date of Review:	03/05/2024
Date of next Review:	03/05/2025
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Document and Data Retention Policy

Introduction

The purpose of this Document and Data Retention Policy is to determine how documents are handled, retained and disposed of by Vision Rehabilitation Training Ltd. In line with data protection requirements we will make sure information is:

- *used fairly, lawfully and transparently*
- *used for specified, explicit purposes*
- *used in a way that is adequate, relevant and limited to only what is necessary accurate and, where necessary, kept up to date*
- *kept for no longer than is necessary*
- *handled in a way that ensures appropriate security, including protection against unlawful or unauthorised processing, access, loss, destruction or damage*

<https://www.gov.uk/data-protection>

By listing which information we keep and how long documents and data must be retained, we are ensuring the accuracy and security of important records. Employees must uphold this policy and follow the guidelines detailed below.

Scope

This policy covers all documents created by staff, contractors and associates of Vision Rehabilitation Training Ltd including but not limited to electronic and physical records:

1. Apprenticeship records and data
2. Financial data
3. Business Documentation
 - Meeting minutes
 - Spreadsheets
 - Documents
 - Presentations
 - Any scanned documents submitted by employees or external sources

Apprenticeship

Learner Records

All data and records relating to Apprenticeship Learner Records will be retained in line with the requirements of the Education and Skills Funding Agency. *Learner files should be retained securely for 6 years from Financial Year End after end of course or until 31/12/2030.*

Live Portfolios

Apprenticeship documents and records that form their 'Live Portfolio' will be retained for 2 years from end of their course. **For more details visit:**

<https://www.gov.uk/government/publications/record-keeping-and-retention-guidance-for-fe-training-providers/record-keeping-and-retention-information-for-training-providers>

Financial Data.

All documents and data will be stored securely, on third party financial systems for 6 years from the end of the last company financial year - for more details visit

<https://www.gov.uk/running-a-limited-company/company-and-accounting-records#:~:text=How%20long%20to%20keep%20records,of%20the%20company's%20accounting%20periods>

Business Documentation

To ensure consistency all documents produced in relation to the work and function of Vision Rehabilitation Training Ltd will be stored electronically for 6 years from the end of the last company financial year, within which they were produced.

Storage

All data and documents will be stored on secure, off-site, cloud-based servers. Any paper records stored whilst converting to electronic records will be stored securely in fireproof non portable storage containers.

Disposal

All records, as described above, at the end of their retention period will be systematically deleted, made unreadable or unreconstructable.

- Electronic data will be deleted from all files and their location pathways corrupted
- Paper records will be cross-cut shredded and disposed of securely