

DOCUMENT RETENTION SCHEDULE: COMMUNITY & LIVING

The Pulse

Ref No	Function Description	Retention Action	Examples of Records
Pulse 1	Freelance instructor contracts	Destroy at the end of contract	Manual record kept in managers office
Pulse 2	Staff letters	Destroy 1 year after action	Electronic copy
Pulse 3	Meeting minutes	Destroy after 2 years	Electronic copy
Pulse 4	Letters to general public <ul style="list-style-type: none"> • Party confirmation • Complaints 	One month after party 1 year after complaint is resolved	Electronic copies on t/drive Emails
Pulse 5	Direct Debit confirmation letters Direct Debit confirmation emails	Destroyed after 7 days	Electronic – tdrive Emails (secure)
Pulse 6	Membership forms	Destroyed at end of membership term (1 year)	Manual copies stored in manager's office

<p>Pulse 7</p>	<p>Membership Data base – send emails, newsletters, and general correspondence. Enables the member to book online.</p> <p>Members' spreadsheet – sales team to contact customers to renew their membership.</p>	<p>Archived after 2 years of membership or usage stopping</p> <p>Members removed after 2 years</p>	<p>Electronic – plus 2 booking system</p> <p>Spreadsheet</p> <p>All password protected</p>
<p>Pulse 8</p>	<p>Prospect reports on customers who are not members but use the centre.</p> <p>Customers are offered membership to help save money based on their current usage.</p>	<p>Archived after 2 years of user stopping using the centre.</p>	<p>Electronic reports from the plus 2 booking system</p> <p>Password protected</p>
<p>Pulse 9</p>	<p>User questionnaires – surveys go out to customers via email to gather information on how to improve our services</p>	<p>Archived after 2 years of stopping using the centre or on request of the customer.</p>	<p>Electronic reports from the plus 2 booking system</p>
<p>Pulse 10</p>	<p>Gym induction Par Q forms. Monitors the health suitability of a customer to take part in physical activity and sets their goals.</p>	<p>Medical information is taken from the ParQ and added to membership data base.</p> <p>Customer is contacted after induction to make sure they are happy with the process.</p> <p>ParQ destroyed after 1 month</p>	<p>Manual form stored in manager's office.</p>

Pulse 11	Personal Training and programmes. Individual plans for clients kept by the client's instructor.	Destroy after 2 years of training or at the end of training at the request of the client. (client given the option when they book)	Electronic programmes stored on Tdrive in individual instructor files.
Pulse 12	Healthy lifestyles exercise on prescription (prescriptions and health analysis forms) – The prescriptions detail why they have been referred by a medical professional. The health analysis records the client's health, goals and plans and results.	Destroy paperwork 6 months after finishing the scheme.	Manual forms stored in managers office
Pulse 13	Boditrax health assessments. Records health details on the clients and sends the results electronically to the client.	Records are kept on the system indefinitely. Records can be removed at customer request by contacting Boditrax. Customers informed when signing up to have their health check.	Stored electronically on the Boditrax system.
Pulse 14	Refund Forms – forms signed by customers in the event of a refund being issues for goods or services.	Destroy after 7 years.	Manual records stored in Pulse store in filing cabinet
Pulse 15	Banking records. Records of transactions banked.	Destroy after 7 years	Manual records stored in Pulse store and electronic records on tdrive/finance
Pulse 16	Vouchers – this are issued either during promotion or purchased as presents.	Destroy the voucher one month after use. Free vouchers are used to gather customer data. Customers give consent at time of use.	Manual vouchers

Pulse 17	Income reconciliation – records and checks income for the centre	Destroy after 7 years	Electronic and manual records
Pulse 18	Learn2 learn to swim data base. Holds records of all children on the learn to swim programme. Information includes – swim stages, progress, payment status and history of the swimmer. This is linked to the plus 2 data base. The data base is used to allow parents to track their child's progress, make payments and move children once a stage has been completed.	Information is stored indefinitely as the records are educational.	Electronic data base password protected
Pulse 19	National Pool lifeguard course records – information on course content and progress of candidates. As an RLSS training centre we have to keep records to be verified by the external	Destroy after 7 years on once verified whichever is sooner.	Manual records in Pulse store
Pulse 20	School swimming Records. Progress of children whilst they swim each term. Records are passed to the school at the end of their swimming term.	Destroy after 1 year if school do not want the records.	Manual records in Pulse store
Pulse 21	School holiday and crèche parental signing in records. These are to ensure we have a	Destroy once the children are collected.	Manual registers at reception.

	record of children on site and up to date parental contact details.	No need to keep as we have an electronic record of attendance.	
Pulse 22	First Aid S01 forms. Records injuries and incidents of customers and staff.	Retain for 7 years or 7 years after a case has been closed.	Manual records stored in Pulse store
Pulse 23	Cleaning schedules – records of cleaning and frequency of cleaning in all areas.	Dispose of after 1 year unless there is a Health and safety incident which requires the records as supporting evidence.	Manual records stored in Pulse store
Pulse 24	Customer till receipts which have not been taken from the customer – currently placed in the bin at reception	Disposed of on same day if customer does not want the receipt.	Not stored
Pulse 25	Photographic permissions form. Customers record why and what they are using their camera or phone to take pictures of.	Dispose of after 1 year.	Manual records stored at reception