

## Children's Services Quick Guide

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### Recording File Retentions

**File retention** is used to record how long any paper and electronic files should be kept once involvement has ended from a service.

Mosaic has retention periods set up in line with the Records Retention and Disposal Schedules.

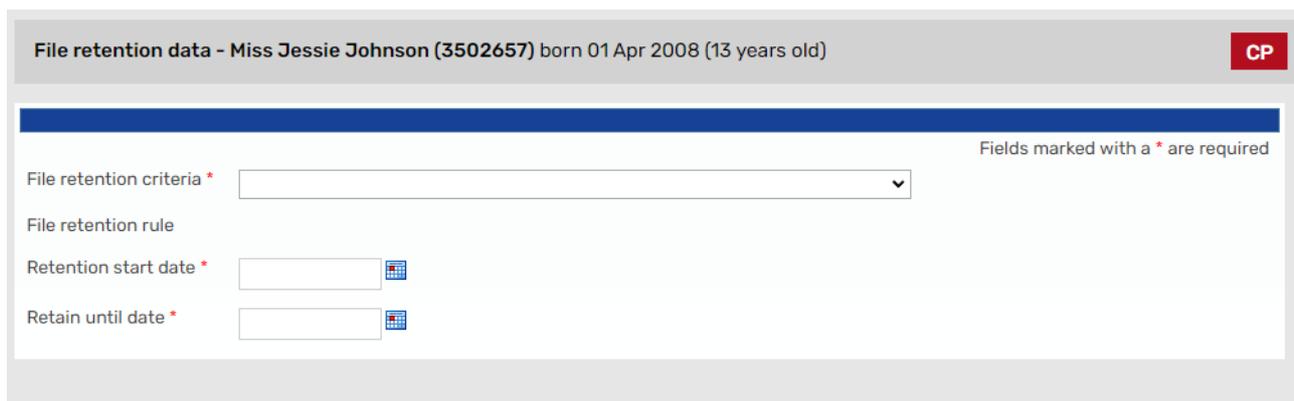
If a **File retention** has already been recorded it will display within the **Person summary** screen on the right hand side of the screen. This can be updated to be increased if required.

It is the responsibility of each individual service to add or review the **File retention** criteria when closing a case.

### Recording a new File Retention

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From within the **Person summary** screen, select **File management > File retention**. The **File retention data** screen displays.



File retention data - Miss Jessie Johnson (3502657) born 01 Apr 2008 (13 years old) CP

Fields marked with a \* are required

File retention criteria \*

File retention rule

Retention start date \*  

Retain until date \*  

Complete the fields as follows (fields marked with \* are mandatory):

- **File retention criteria\*** – Select from dropdown menu as appropriate
- **File retention rule\*** – Will prepopulate once a File retention criteria option has been selected
- **Retention start date\*** – Will either prepopulate or need to be manually input depending on the File retention criteria option selected

- **Retain until date\*** – Will prepopulate when a Retention Start Date has been added
- Click **Save**

The **Person summary** screen re-displays. The **File retention** recorded will display on the right hand side of the screen.



## Updating File Retention period

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The **File Retention** period that has previously been recorded can be updated to increase the File Retention period if required at case closure.

If the person is receiving support from multiple teams, the **File retention** period that should be recorded is the one that has the highest value. For example, if you are working with a child that is currently in school, the File Retention option that would be chosen would be **CS Children Education: Pupil in Lincolnshire** when your involvement ends. This would return a retention period of 25 years.

However, if the same child was also a Child in Care, then the file option that would be chosen when the Child in Care team end their involvement would be **CS Children in Care Services: Child in Care**, which would return a value of 75 years. This would over-write the Education option because it has a greater value.

A **File retention** period that has already been added cannot be decreased.

From within the **Person summary** screen select **File management > File retention**.

The **File retention data** screen displays with the current File retention recorded highlighted in yellow.

**File retention data - Miss Jessie Johnson (3502657) born 01 Apr 2008 (13 years old)** CP

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Fields marked with a \* are required

Current retain until date 01/04/2033

Current file retention criteria CS Children Education: Pupil in Lincolnshire (CFS.2; CFS.6; CFS.8; CFS.14)

File retention criteria \*  ▼

File retention rule File to be retained for 25 years from date of birth

Retention start date \*

Retain until date \*

Entered on 22/02/2022 at 16:20 by Mrs Amy Brooke.

Complete the fields as follows (fields marked with \* are mandatory):

- **File retention criteria\*** – Select the new criteria that applies from the drop down option. If an option is selected that has a lesser value to the existing File Retention period a red warning will appear
- Click **Save**
- Click **Cancel** to exit the screen if the **File retention criteria** does not need amending

The **Person summary** screen displays. The new **File retention** recorded will display on the right hand side of the screen.