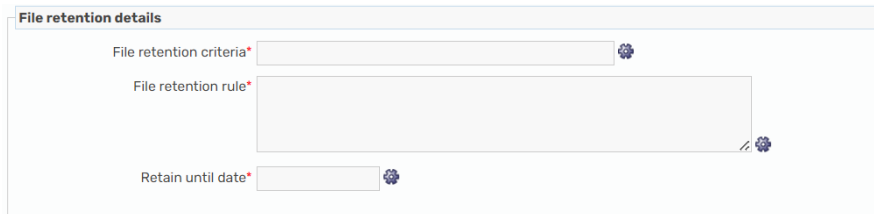


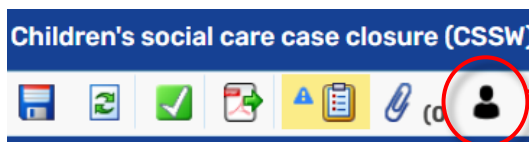
Recording File Retention on MOSAIC

It is important that when a **case is closing**, that Managers/Seniors start to record the **file retention**, this a **GDPR (General Data Protection Regulation)** requirement.

The file retention details are now included within the Children's Social Care Case Closure record, as mandatory fields.



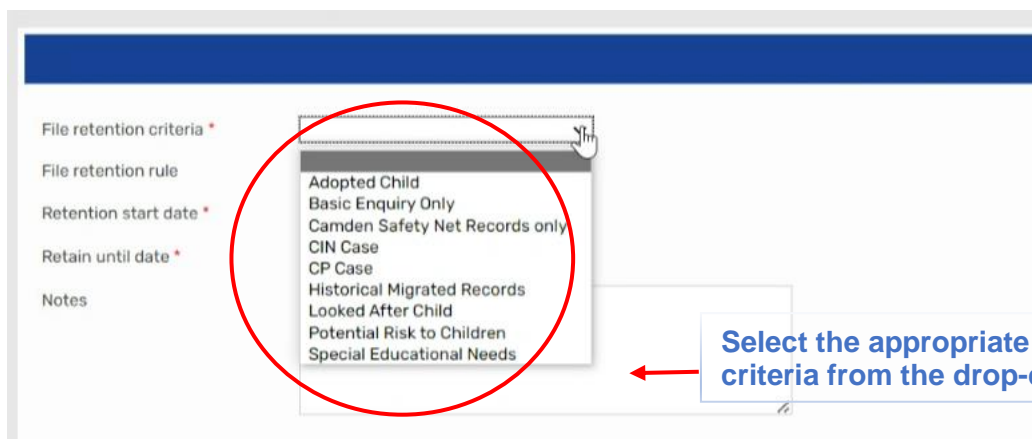
If you find that file retention details are not complete, click on the show summary icon below



This will take you to the person summary screen



Select File management, File retention



Select the appropriate File retention criteria from the drop-down menu

File retention criteria *

File retention rule

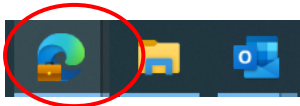
Retention start date *

Retain until date *

Notes

Save **Cancel**

Once selected, the other fields will automatically pre-populate and then save



Select your internet browser at the bottom of your screen

Child protection history Date of birth Born 9 Nov 2018 (5 years old)

Access Mosaic Case Manage... Access Mosaic Case Managem...

Groups

Family

Mary, Rachel, Joseph Joseph CIN, Mary CIN, Rachel CIN

File retention

Retain until 09/11/2043

And displayed you will see your Case closure window

Select the refresh icon if no file retention details are pre-populating

Children's social care case closure (CSSW) : Mary CIN 2207640

Child's social care case closure record (CSSW)

Sections

- Closure details
- Resilient families outcome measures - Progress
- Supervisor's authorisation
- Next actions

Indicates completed section

Open Child Protection Plan - Must be empty for case closure

Category Start Date

Outstanding Services - Must be empty for case closure

Service Start Date Status

File retention details

File retention criteria*

File retention rule*

Retain until date*

Children's social care case closure (CSSW) : Mary CIN 2207640

Child's social care case closure record (CSSW)

Sections

- Closure details
- Resilient families outcome measures - Progress
- Supervisor's authorisation
- Next actions

Indicates completed section

Open Child Protection Plan - Must be empty for case closure

Category Start Date

Outstanding Services - Must be empty for case closure

Service Start Date Status

File retention details

File retention criteria* CIN Case

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

Retain until date* 09/11/2043

Completion details

Once File retention has pre-populated finish case closure as normal

What do I do when I find that an existing file retention date has been prepopulated into the client's closure record, I am about to complete?

DON'T finish without verifying that the prepopulated file retention criteria is the most appropriate one.

DO think about the case history to determine the most appropriate file retention rule for the case and if necessary, update it on the client record.

DO then refresh the Closure record form to prepopulate the new details into it.

TIP most appropriate file retention criteria is the one with the longest retention period based on the particular case history.

EXAMPLE 1- say the file retention criteria on record is **CIN Case (File to be retained for 25years from DOB)** and case has since reopened as CP, subsequently stepped down to CIN for 6 months and now to be closed. Because of the CP case history, file retention criteria need to be updated to **CP Case (File to be retained for 75 years from case closure date)**.

EXAMPLE 2 – say file retention criteria on record is **CLA case (File to be retained for 100 years from date of birth)** but case has since reopened and now to close following CP intervention. **Do not** update file retention criteria to CP case (File to be retained for 75 years from case closure date) **because it has a shorter retention period than CLA cases.**