

# Guidance for the storing and destroying of adult appointment forms



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## Updates to this factsheet

The information in this factsheet may be subject to change as the result of new legislation or guidelines. The Association will publish any new information, if and when it becomes available, at [www.scouts.org.uk/appointment](http://www.scouts.org.uk/appointment). This webpage should be checked regularly to ensure that you have the most up to date information.

## Forms in Scouting

There are a number of forms that need to be completed in order to record the progress of an adult's journey through Scouting. This factsheet provides details about the procedure for submitting, retaining or destroying forms.

The forms covered in this factsheet are:

- the Adult Application (AA) Form;
- the Occasional Helper (OH) Form;
- the Repeat CRB Check (RCRB) Form;
- the Appointment Review (AR) Form;
- the Reference (RF) Form; and
- the Cancellation/Suspension (CS) Form.

## Who is this factsheet for?

This factsheet will be particularly helpful for Secretaries, Appointments Secretaries and other Administrators in Scouting.

This guidance has been written in order to provide support for the effective administration of the appointment process locally. Specifically, this means ensuring that paperwork is only kept for as long as it is relevant and is safely destroyed, that relevant information is stored appropriately and that relevant information is sent to Headquarters where necessary. This will help local Scouting to fulfil its responsibilities under the Data Protection Act.

This factsheet is not intended to remove the responsibility for the management of information from Appointments Advisory Committees, but for Headquarters to provide local Scouting with support to fulfil responsibilities under the Data Protection Act.

## Why forms should be retained or destroyed

The Data Protection Act aims to protect an individual's right to privacy by promoting high standards in the way personal information about individuals should be handled. The rules apply to personal information held electronically, including in emails, word documents, spreadsheets, in a database or held manually in a readily accessible filing system.

Therefore, such information collected in the course of Scouting needs to be dealt with appropriately in order to comply with the Data Protection Act. For example, forms and information should:

- Be kept only for as long as required for the purpose for which it was obtained; and
- Be kept secure proportionately to the level of harm that could result if unauthorised access occurs.
- Be accurate and up to date

## Sensitive personal data

Certain personal data is categorised as 'sensitive personal data' and the explicit consent of the individual is needed to obtain and store such information. For example, personal data becomes 'sensitive' if it includes information as to religious beliefs, physical or mental health or the commission of offences or alleged offences.

Therefore, it is particularly important to follow these guidelines in order to appropriately store and destroy sensitive personal data.

**Please note:** The Data Protection Act factsheet (FS270001) gives basic information on the Act and should be referred to in conjunction with the information here. Please refer to the Information Commissioner's Office for full details.

## How should forms be stored?

All forms need to be appropriately stored to ensure that any personal data is secure and protected. This requires taking sensible

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precautions to make sure that they cannot be inappropriately viewed or accessed by anyone.

These precautions include: making sure that the premises on which the forms are kept are secure; that forms are kept in a locked location where possible; and ensuring the safety of the forms when not being stored (e.g. using appropriate postage when sending between people, and making sure forms are not left unattended at meetings).

Although forms would normally be processed and stored by the Appointments Secretary, local arrangements might ensure that someone else (e.g. the Appointments Chairman) stores the forms. These arrangements should always consider the guidance mentioned here when deciding who the most appropriate person is.

#### **How should they be safely destroyed?**

The forms should also be safely destroyed (timescales as per the guidance in the rest of this factsheet) to remove all personal information. Shredding is an example of an appropriate method.

**Please note:** This advice on storing and destroying forms has been taken from the Information Commissioner's Office, *Data Protection Good Practice Note: Security of Personal Information*, and should be read in conjunction with the information in that document.

#### **1: The Adult Application (AA) Form**

The AA form needs to be retained locally until a full appointment has been recorded; i.e. when all approval checks are complete and any *Getting Started* training has been completed. This should mean that the form is stored for no longer than twelve months, and then destroyed.

#### **2: The Occasional Helper (OH) Form**

The OH Form needs to be retained until the Criminal Records Disclosure (i.e. CRB or Access NI Form) has been issued. This should mean that the form is normally stored for no longer than two months, and then destroyed.

#### **3: The Repeat CRB Check (RCRB) Form**

The RCRB Form needs to be retained until written notification of CRB Disclosure is received. This should mean that the form is normally stored for no longer than three months, and then destroyed.

#### **4: The Appointment Review (AR) Form**

The AR Form should be retained locally, by the Appointments Secretary (or whoever the

appropriate person is) as part of an adult's record until the next review has been completed. The form should be sent to the individual and their line manager (or person carrying out the review) before the Review period is due.

The new AR Form then replaces the old one. This means that a single AR Form should be stored for no longer than five years, and then destroyed.

#### **5: The Reference (RF) Form**

The RF Form should be retained locally until a decision has been made as to whether or not to appoint.

If you decide to appoint, the forms should be destroyed as soon as that decision is made and the individual's record has been updated with this information.

If you decide **not** to appoint, due to an unsatisfactory reference, the RF Form should be sent to the Records Manager at Gilwell Park along with any other relevant information regarding the decision not to appoint, within one week of the decision being made.

This means that the form should not be kept for longer than one month from the date at which a decision is made and then either destroyed, or sent to Headquarters.

#### **6: The Cancellation/Suspension (CS) Form**

The CS Form should be used to inform of the cancellation of an individual's appointment for an unsatisfactory reason or in order to suspend an individual from Scouting. The completed form (including any relevant information regarding the decision to cancel or suspend that person) must be sent to the Records Manager at Gilwell Park. This means that the form should not be kept for longer than a week before it is sent to Headquarters.

#### **7: Approval Panel meeting notes**

Appointments Advisory Committee members may make notes about the applicant as a result of the approval meeting and should record significant points about the decision.

If it decides to appoint, any notes should be destroyed as soon as that decision is made and the individual's record has been updated with this information.

If you decide **not** to appoint, all notes should be sent to the Records Manager at Gilwell Park along with any other relevant information regarding the

decision not to appoint, within one week of the decision being made.

### **8: Suspension**

When ending a period of suspension the Appointments Advisory Committee may meet the adult involved and make a recommendation about the status of their suspension. Copies of all communication that relates to the suspension (by email, letter or phone), Committee meeting notes and copies of any decisions made, must be forwarded to the Records Manager at Gilwell Park, within one week of the Appointments Advisory Committee meeting.

### **Further Information**

This factsheet should be read in conjunction with: POR chapters 3, 4, 5 and POR: The Appointment Process;  
(For Scotland also) Scottish Variations from POR  
*'Criminal Records Checks'*, FS321004  
*Data Protection and the Data Protection Act 1998*, Version 2 FS270001  
*Introduction to the Adult Training Scheme* FS500014

Full details on the appointment process can be found at [www.scouts.org.uk/appointment](http://www.scouts.org.uk/appointment)

All forms quoted are available from the Scout Information Centre and on [www.scouts.org.uk](http://www.scouts.org.uk)

For the latest information about the storing of data, visit the website of the Information Commissioner's Office <http://www.ico.gov.uk/>

Information Commissioner's Office, *Data Protection Good Practice Note: Security of Personal Information*