Storing duplicate of information sent to SAR applicants

This is the procedure based on the last paragraph in item *9 Deciding What to Disclose* of the [Subject Access Requests Policy](http://hbc/teams/InfoGov/SharedDocuments/Subject%20Access%20Requests%20-%20Corporate%20Policy.docx). It should be read in conjunction with this policy.

*A copy of the redacted records, as sent/given to the data subject must be retained, for example on file or scanned into SharePoint or relevant secure area for the length of time applicable to the records in full.*

The copy of information sent to applicants (i.e. the HBC copy) must be stored in the relevant case of the Corporate Tracking System. An electronic copy should always be created and the paper version securely disposed.

# Small amounts of information

If there is a small amount of paperwork, the officer co-ordinating the SAR should scan and upload the paperwork to the Corporate Tracking System SAR case, ensuring the paper copy is securely disposed.

# Large amounts of information

Where a substantial amount of paperwork is produced to fulfil a SAR, typically in social care, it should be sent to the Records Management Unit for scanning. Follow the below procedure:

1. The officer co-ordinating the request prepares the package of documents which will be released to the person requesting the information. This is the Applicant’s copy.
2. The officer emails [RMU Resources](mailto:rmu@halton.gov.uk) to request the collection, scanning, and return of the Applicant’s copy. A note must be attached to the Applicant copy identifying it as a Subject Access Request (Applicant copy for scanning), SAR ID (from the Tracking System) and the subject’s name. For example:

*Subject Access Request – Applicant copy to be scanned and returned ASAP to [Officer name]*

*SAR ID 738*

*Joe Bloggs*

**Please allow 2 working days for collection, scanning and return of the Applicant’s copy.**

1. RMU courier collects and delivers the Applicant copy to RMU.
2. RMU staff scan all the paperwork into the RMU Team site document library 'SAR Records Scanning’ which records the subject and SAR ID against the PDF files created. Multiple files per SAR may be required. Each PDF file size must be less than 100MB for ease of handling/access. All electronic files are quality checked by RMU for authenticity.
3. RMU return the Applicant hard copy to the co-ordinating officer via the RMU courier. The copy is released to the Applicant.
4. An auto notification email is sent to the Information Governance Team when new PDF files are saved to the ‘SAR Records Scanning’ folder.
5. The Information Governance Team upload the PDF files to the relevant SAR case in the Corporate Tracking System, check the PDFs open in situ, then delete the RMU Team site copies.