**Sending Personal Filing to the HR Filing Unit**

**HR Filing Unit**

All current employee personal files held by individual HR offices were moved to the HR Filing Unit based at the Newcastle Blood Centre in June 2017.

The HR Filing Unit was set up to hold all employee files and provide the ability to access files centrally and keep records up to date with documentation received via recruitment or HR Managers.

***Procedure for sending Leaver employee files to the Filing Unit***

When an employee leaves the organisation it is the responsibility of the manager to send any relevant personal documentation in their possession to the HR Filing Unit to add to their personal file before this is sent to archive.

The timescale for sending documentation to add to personal files is within 3 months of leaving date.

The Filing Unit are unable to accept any files or documentation for employees who left NHSBT prior to 2017. These should be archived directly by your own department and kept for a period of 7 years before being recovered and reviewed. The exception to this is for employee training records which after 7 years should be retained and sent on to the Filing Unit to archive.

***What records should a manager send to the HR Filing Unit?***

Records relating to recruitment and secondment assignments

Inductions, probation documents and PDPR’s

Grievance & current disciplinary outcomes

Flexible working requests and outcome

Absence review paperwork

All training records

Contractual changes

Resignation letters and acknowledgements

Occupational Health reports

***Documents not required to be held by the Filing Unit***

Annual leave / special leave / maternity leave (details recorded on ESR)

Anything directly related to pay should be held by Pay Support which is also based in Newcastle

Routine return to work interview forms

Expired disciplinary warnings

No documentation related to operations eg donor sessions

***Process for Sending Documentation for Filing***

When sending any documentation to the HR Filing Unit in the first instance please make sure you make contact via email at [HRFilingTeam@nhsbt.nhs.uk](mailto:HRFilingTeam@nhsbt.nhs.uk). Please provide a summary of the documents you will be sending so that we acknowledge safe receipt once they have arrived.

Files / documents should be boxed or enveloped securely and marked ‘strictly private and confidential’. Envelopes coming through the normal postal system should be sent ‘recorded delivery’ for safe receipt and signature on arrival. If you are sending larger envelopes / boxes via the internal postal system please make sure you mark in the same way but ensure boxes do not exceed maximum 12.5 kg limit.

The postal address for the Filing Unit is as follows:

NHSBT Filing Unit

Newcastle Blood Centre

Holland Drive

Off Barrack Road

Newcastle upon Tyne NE2 4NQ

Once your files arrive in Newcastle, the filing unit will acknowledge safe receipt via email, unfortunately we cannot store documentation that should not have been sent so this may be returned to you.