

Health and Safety documentation – Storage and Retention

Introduction

This guide outlines how health and safety documentation can be stored and communicated within Schools and Divisions, and how Managers can use Teams and Box as tools to manage, collaborate on and communicate health and safety documentation with their teams.

Record Management

Managers are required to ensure health and safety documentation is stored and retained following the university’s record management processes. The University Records Management Policy, related guidance and the Master Records Retention Schedule are available on the [Records Management](#) pages on Sussex Direct, and includes guidance on [Record Naming and Version Control](#).

Examples of Health and Safety Documents

The following non-exhaustive list are examples of health and safety documentation that your teams may create and maintain:

- Risk assessments
- Standard Operating Procedures (SOPs)
- Emergency Operating Procedures (EOPs)
- Induction checklists
- School Health and Safety Committee papers
- Health and Safety Coordinator documentation/ records
- Workplace inspections
- Minutes and agendas of meetings where health and safety is discussed
- Health and Safety briefing notes, training presentations and course planners

It is best practice to maintain a master list of risk assessments which indicates the owner and date they will be reviewed. These can be maintained at a group level or School/Division wide, and the local Health and Safety Coordinator should have access to this list.

Secure Storage of Health & Safety Files/Documents

University files/documents are composed of diverse data types, and each type may have multiple storage options that you can use depending on business requirements. The storage option you choose will depend on the type of data and the level of security required for that type of data, however, University files/documents should not be stored on a personal email, cloud account or device.

The recommended platform for the secure storage of health and safety documents is **Sussex Box**.

| Document Control | | | | | |
|------------------|---------------|-------------|-------------------|-------------|----------|
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File/Document Types with Storage Options

Box can be used for individual storage, group collaborations, departmental/ team documentation, storing protected documents (restricted/sensitive) and for archive. The following table provides examples of document types and appropriate storage options.

| INDIVIDUAL | GROUP/COLLABORATIVE | PROTECTED |
|---|---|--|
| <p>University files/documents only accessed by the owner:</p> <ul style="list-style-type: none"> • Used on a regular basis • No need for collaboration • Office files/documents • Pictures, videos, audio files <p>Option(s)</p> <ul style="list-style-type: none"> • Box • OneDrive (a Microsoft cloud storage service that connects you to all your files in the web version of Microsoft Office.) | <p>University files/documents shared for collaboration:</p> <ul style="list-style-type: none"> • Owned and managed by an individual. • Requires editing, review, and sharing with others • Office files /documents • Pictures, video, audio files. <p>Option(s)</p> <ul style="list-style-type: none"> • Box | <p>University files/documents classified as restricted or confidential:</p> <ul style="list-style-type: none"> • Owned and managed by department or individual. • H&S or other University sensitive data which requires special handling and security • Any type of file/document • Could be long term or short term use. <p>Option(s)</p> <ul style="list-style-type: none"> • Box |
| DEPARTMENTAL | ARCHIVE | BACKUP |
| <p>University files/documents shared within a department:</p> <ul style="list-style-type: none"> • Owned and managed by the department • Requires sharing and access by other department members • Office documents • Pictures, video, and audio files. • Recommended for long term storage of University files / documents. <p>Option(s)</p> <ul style="list-style-type: none"> • Box | <p>University files/documents not used on a regular basis:</p> <ul style="list-style-type: none"> • Used by individual or department • Could require ability to share • Any type of file/document • Used for historical purposes or limited access • Longer term storage <p>Option(s)</p> <ul style="list-style-type: none"> • OneDrive • Box | <p>University files/documents saved to provide restoration of a critical system:</p> <ul style="list-style-type: none"> • System files for computers that must be available • Provides recovery point for restoration in emergency • Files are large • Not allowed in Box or OneDrive <p>Option(s)</p> <ul style="list-style-type: none"> • ITS Network Attached Storage (NAS) • External Drive |




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Collaborative Working and Sharing Information

Microsoft Teams is a virtual workspace where you can chat, meet, and collaborate with your colleagues. Unlike some other chat platforms, it is also GDPR compliant meaning all your data and messages are stored securely. Teams can create specific sites for individual teams / services, which provides a space for team conversations, to share files and to work on them together. Teams can therefore be used as a management tool to:

- Share health and safety documentation.
- Engage and involve team members in the development of new or revised documents.
- Consult with staff representatives and other stakeholders.
- Communicate and promote new documents or raise awareness of changes/ revisions.

Why you should use Teams

| | |
|--|---|
| <p>A workspace with your colleagues</p>  | <ul style="list-style-type: none"> • Discuss the development of documents, or promote new/ updated information through the Chat Room function. • Add files to a Team so that they become available to all members to open, edit, and save. • Work on Office files together with colleagues, live within Teams. There are a range of tools to make this easy and to improve collaboration. • Share your screen, and easily demonstrate something on your own computer or device. |
| <p>GDPR compliant and secure</p>  | <ul style="list-style-type: none"> • Your work is stored securely, so that files and chats with other members of the University are GDPR compliant. • Many other chat platforms are not compliant. If you use these, you may expose the University to risk of legal action. ITS provides guidance for which chat and collaboration platforms to use for your university work. |
| <p>Stay connected, work anywhere</p>  | <ul style="list-style-type: none"> • Wherever you are, you can start live chats with colleagues, access any files that have been uploaded into Teams and collaborate on documents. |

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Further information

How to Install Teams and request a Team

IT Services provides guidance on how to install Teams and how to request a dedicated Team to collaborate with your colleagues. [Getting started with Teams – Staff Guide](#)

Training in Box and Teams

Training for these solutions is available via the [IT Training pages](#) on Sussex Direct, through useful 'FAQ' guides and online videos.

Sussex Resources:

[Guidance for staff using Box](#)

[Getting started with Box - Staff Guide](#)

[Getting started with Teams – Staff Guide](#)

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