

Appendix Two – Process for accessing recordings

Document Control			
Organisation		West Lindsey District Council	
Title		Accessing Telephone Call & Screen Recording Process	
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Author		Lyn Marlow, Customer Strategy and Services Lead	
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2019	Lyn Marlow	2009	Amended job titles
June 2025	Lyn Marlow	2019	Included Screen Recording Review of procedure at Management Team, JSCC and policy/procedure adoption at CPnR

Accessing Call & Screen Recording Process

1. Accessing Call Recordings (Internally)

- 1.1 Any designated manager or supervisor of the Genesys CX Platform can routinely access call recordings of staff for coaching, training and monitoring purposes. The system provides an audit trail of who accessed which recordings and if downloaded.
- 1.2 All officers who received telephone calls via the Genesys CX Platform may wish to access recordings they have been involved in and can do this by

speaking with their line manager/supervisor. These recordings are not downloaded. If a download is required, then a formal request must be made via the form on Minerva detailing the following:

- a) number the customer rang from
- b) date and time of the call
- c) reason for the request, for example SAR, complaint investigation, coaching of staff and inappropriate behaviour of a customer

- 1.3 A file of the recording will be sent to the requester by email.
- 1.4 It is the requester's responsibility to delete any call recordings requested once the investigation/coaching etc is complete and if retained must be deleted within 6 months unless needed for an ongoing investigation. Recordings will be deleted once any investigation has been satisfactorily closed.
- 1.5 Calls are deleted automatically by the Genesys CX Platform, once they hit 6 months old, unless flagged for retention. Once deleted, recordings cannot be retrieved.
- 1.6 To request a call(s) to **not be deleted**, please submit a request via Minerva detailing the following:
 - a) Number the customer rang from
 - b) Date and time of the call
 - c) Reason for the request, for example SAR, Complaint, investigation or inappropriate behaviour of customer
 - d) New date for deletion

2. Accessing Call Recordings (by customers)

- 2.1 Customers can request access to call recordings by completing a Subject Access request (SAR), to include:
 - a) Number the customer rang from
 - b) Date and time of the call (or a date range if more than one call recording to/from the telephone number is required)
 - c) Once the SAR is validated, the Data Protection Officer will complete the Minerva form to retrieve the relevant call recordings

3. Accessing screen recordings

- 3.1 Screen recording **will not be** provided to customers due to the sensitive nature of technical data held on the recordings.
- 3.2 Any designated Contact Centre Manager/Supervisor can routinely access screen recordings of staff for coaching, training and monitoring purposes. The

system holds an audit trail of who accessed which recordings and whether the recording was downloaded.

- 3.3 Screen recordings will be deleted automatically after 3 months, by the Genesys CX Platform.
- 3.4 To request a downloaded screen recording submit a Minerva request detailing the following:
 - a) Date and Time
 - b) User details
 - c) Reason for needing the screen recording
- 3.5 To request a screen recording to **not** be deleted submit a Minerva request detailing the following:
 - a) Date and Time
 - b) User details
 - c) Reasons for needing the screen recording
 - d) New date for deletion