

Deleting journal entries

There is a risk that deleting journal messages which contain attachments could destroy necessary audit trails in the event that the Department is ever legally challenged.

Messages can only be deleted by staff within 30 days of them being created. It is therefore essential to check that messages, especially those with attachments are correct at the time they are created. If errors are noticed, the message should be deleted straightaway.

Claimants are often confused when messages they have previously seen suddenly disappear without any explanation. Therefore, if messages are deleted remember to add a brief explanation so the claimant is aware of what has happened.

The information below and on the next slide gives circumstances when journal entries can and cannot be deleted.

Best practice when deleting journal entries

The following is good practice to avoid causing the claimant confusion:

- if journal entries are deleted and replaced with a corrected version, the box to notify the claimant of the new journal entry by text or e-mail should be unchecked. The claimant then receives just one text or e-mail informing them of a journal entry. Provided the mistake is rectified quickly, this reduces the risk of the claimant noticing a change in their journal entries
- where journal entries are deleted and not replaced, a note for the claimant explaining the deletion could avoid confusion

When to use the delete function and when not to

When to use the delete function

The following message and uploaded SSP 1 form were deleted from the claimant's journal 64 days after they were originally posted.

"Message - SSP1 received states - Employer can no longer pay her. SSP1 attached".

The form was incorrectly uploaded to the journal. This was subsequently corrected and uploaded to the claimant history for a RTI dispute.

Other circumstances when journal entries can be deleted:

- addressed to wrong claimant
- personal information has been added
- spelling mistakes
- incorrect dates
- due to quality check
- incorrect letter uploaded (WCA and Claim closure)

When not to delete journal entries

A claim had the following message and attachment in the journal to advise the claimant about Work Choice programme.

"Message *** WORK CHOICE *** Please read the enclosed information about Work Choice which aims to help people who have a Fit Note take your next steps towards training and work. We will discuss this at our next conversation. Attachment – Work Choice info."

At the claimant's next appointment 26 days later, due to a change in the claimant's circumstances, the message was deleted as the information was no longer relevant.

This should not have been deleted as it was relevant to the claimant's circumstances at the time it was entered in the journal.