



THE UNIVERSITY *of* EDINBURGH

## **Retention Schedule – Applicant and Staff Personal Information**

The law requires the University to retain personal information about you for only as long as is necessary.

This document describes how long we retain personal information about job applicants and staff<sup>1</sup> for recruitment and employment purposes. We hold this information in our HR system, and in electronic and paper folders.

We securely delete or destroy personal information as soon as practical after the retention periods ends.

As folders contain information with different retention periods, we will usually keep the whole folder for the longest retention period. This is because it is not always practical to dispose of each piece of personal information as soon as its retention period has expired.

**University HR Services May 2018, updated February and June 2019, March 2021 and September 2022**

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<sup>1</sup> 'Staff' includes both employees and workers

### Job Applicant Information

Information	When information should be destroyed
Unsolicited applications and the University's reply	Immediately after University responds
Information on People and Money	2 years after vacancy closing date
Applicant information and interview/selection notes	6 months after selection process is completed

Note: if the successful candidate requires University sponsorship for a visa, their recruitment information, e.g. application and interview notes must be kept for the duration of sponsorship, plus 1 year after sponsorship ends, i.e. when the employee leaves or transfers to another immigration route.

### Staff Information

Information	When information should be destroyed
Name, address, telephone and email contact details	6 years after the end of employment
Documentation confirming eligibility and right to work in the UK	2 years after the end of employment
Offer letter, contract of employment and any contract amendments	6 years after the end of employment
Documents confirming policies and procedures have been read and understood	6 years after the end of employment

Relocation Agreement	6 years after the end of employment
Visa Loan and Reimbursement Agreement	6 years after the end of current tax year
References (from a third party)	6 years after the end of employment
References (provided to a third party, such as potential employer, voluntary organisation, etc.)	6 years after the end of employment
Requirements regarding job specific training and Continuing Professional Development together with the training provided to meet these requirements	6 years after the end of employment
Records documenting job-specific statutory/regulatory training requirements and the training provided to meet these requirements	6 years after the end of employment
Details of qualifications, skills, experience and employment history, including start and end dates with previous organisations (normally gained from application form/CV)	6 years after the end of employment
Application form and CV	6 years after the end of employment

<b>Information</b>	<b>When information should be destroyed</b>
Job Description	When superseded or 6 years after the end of employment
Record of annual leave and (if applicable) Flexi Time taken	1 year after the end of the current leave year

Bank account details	1 calendar year after superseded or 1 calendar year after end of employment
Tax Code	6 years after the end of current tax year
NI Number	6 years after the end of employment
Salary records, including overtime, allowances, and other payments	6 years after end of employment
Letters confirming contribution award, promotion and job regrading	6 years after end of employment
Age and Date of Birth	6 years after the end of employment
Information required for pension scheme membership	40 years after the end of employment
Information on pensionable salary, pension contributions, additional voluntary contributions	40 years after the end of employment
Qualifications and professional memberships applicable to the role	6 years after the end of employment
Driving licence or any other driving qualification applicable to the role	6 years after the end of employment
Probation records	1 year after the end of probation
Induction records	6 years after the end of employment
Annual Review documentation and training needs	6 years after end of employment
Secondment agreement/Secondment review information	6 years after end of employment
Secondment Review information	When secondment ends

Training records (correspondence relating to training and development needs, training requests and attendance records)	4 years after the end of employment
Health and Safety training records	40 years from the date of the training
Financially supported training scheme records, e.g. staff scholarship scheme	4 years after the end of employment
Unauthorised Leave	6 years after the leave takes place
Information relating to disciplinary, grievance and/or capability proceedings	6 years after the end of employment

<b>Information</b>	<b>When information should be destroyed</b>
Disciplinary sanctions issued in line with relevant policy	As outlined in correspondence
Information relating to a potential or actual redundancy	6 years after the end of employment
Correspondence to and from you concerning your employment	6 years after the end of employment
Last day of employment, records relating to ending of employment and reason for leaving	6 years after the end of employment

Next of kin Emergency Contact details	When superseded or 6 years after the end of employment
Marriage or civil partnership status, disability status, sex, religion or belief, sexual orientation, pregnancy and maternity status, race and gender reassignment	When superseded or 6 years after the end of employment

UK criminal conviction and offence information/Disclosure Scotland checks	Disclosure certificate destroyed/returned to member of staff after viewing. Reference number details held for 6 years after the end of employment
Overseas criminal conviction and offence information	Document destroyed/returned to member of staff after viewing. Details of issuing body and date issued held for 6 years after the end of employment
Flexible Working Applications and work pattern	6 years after the end of employment
Maternity, Adoption, Surrogacy, Paternity, Parental, Shared Parental, Parental, Time Off for Dependants Leave, Special Leave, Sabbatical Leave	6 years after the leave takes place
Details of salary sacrifice schemes i.e. cycle to work, childcare vouchers	6 years after the end of current tax year
Pregnancy, new mother and breastfeeding risk assessments	7 years after the 6 month period after the employee returns to work or ceases to breastfeed
Sick Absence paperwork	3 years after the end of current tax year
Sick Leave and pay records	6 years after the end of employment
Medical or health information	6 years after the end of employment
<b>Information</b>	<b>When information should be destroyed</b>

Occupational health records	40 years following the Occupational Health appointment
Trade Union Subscriptions	6 years after the end of current tax year
Trade Union Officer status	6 years after the end of employment
Industrial Action, including strike information.	6 years after the end of employment
Restricted i.e. sensitive documents that it has been agreed are not for general viewing	6 years after the end of employment
Records documenting major injuries to staff member arising from accident in the workplace	40 years after accident took place
Health Surveillance records regarding exposure to substances hazardous to health or radiation	40 years after exposure took place
CCTV records	30 days after data was captured
Vehicle tracking data	3 years after data was captured
Information on relationships (as per the Policy on Disclosure of Intimate Relationships)	6 years after the end of employment