



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 staff¹ 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, September 2022, and December 2025.

¹ 'Staff' includes both employees and workers

Job Applicant Information

| Information | When information should be destroyed |
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| 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 |
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| Name, address, telephone and email contact details | 6 years after the end of employment |

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| 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 |

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| Application form and CV | 6 years after the end of employment |
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| Information | When information should be destroyed |
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| 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 |

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| 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 |

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| 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 |

| Information | When information should be destroyed |
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| 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 |

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| Next of kin Emergency Contact details | When superseded or 6 years after the end of employment |
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| 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 |
| UK criminal conviction and offence information – Level 2 Disclosure Scotland checks (including PVG) | ID held until application complete (i.e. certificate has been received). Employer copy of disclosure certificate expires automatically 14 days after viewing. Reference number details held for 6 years after the end of employment |
| UK criminal conviction and offence information – Level 1 Disclosure Scotland checks | ID held until application complete (i.e. certificate has been received). Employer copy of online disclosure certificate expires automatically 14 days after viewing or paper certificate 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 |

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| 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 |
| Information | When information should be destroyed |

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| 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 |