

# Records Management and Retention Policy

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The General Data Protection Regulation requires that information is retained only for as long as necessary. These guidelines detail the standard retention period for data held by the Trust.

The retention period may differ in particular circumstances. Where an academy has been taken on by the Trust, certain records may have been retained by the predecessor organisation.

Type of data	Retention period	Reason
Human Resources files: training records; notes of grievance, disciplinary and capability hearings	6 years from the end of employment	Provision of references and limitation period for litigation
Staff application forms/interview notes (unsuccessful applicants)	8 months from the date of the interviews	Limitation period for litigation
Facts relating to redundancies (less than 20)	3 years from the date of redundancies	Limitation period for litigation
Facts relating to redundancies (20 or more)	12 years from the date of redundancies	Limitation period for litigation
Income Tax and NI returns: correspondence with HMRC	6 years after the end of the financial year to which the records relate	Income Tax (Employment) Regulations 1993
Statutory maternity pay records and calculations	3 years after the end of the financial year to which the records relate	Statutory Maternity Pay (General) Regulations 1986
Wages and salary records	6 years from the last date of employment	Taxes Management Act 1970
Records and reports of accidents	3 years after the date of the last entry	RIDDOR 1985

Health records	During employment	Management of Health and Safety at Work Regulations
Health records where reason for termination of employment is concerned with health, including stress related illness	3 years	Limitation period for personal injury claims
Medical records kept by reason of the Control of Substances Hazardous to Health	40 years	COSHHR 1994
Student records including academic achievements and conduct	6 years from last day of course, 10 years with the consent of the student for personal and academic references	Limitation period for negligence