

Function – People and Wellbeing (v5 –November
2024) Responsible Person – Director of People
and Wellbeing

Type of Records	Retention Period	Disposal Action	Notes (for example statutory reason for specified retention period)
Recruitment			
Record of internal discussion of requirement for new post(s)	6 months after completion of recruitment (or 1 year after end of sponsorship if individual hired is sponsored)	Destroy	Immigration, Asylum and Nationality Act 2006, Prescription and Limitation (Scotland) Act 1973, The Equality Act 2010.
Individual job descriptions	2 years after superseded	Destroy	Institutional business requirement.
Grading of individual job roles: correspondence and working papers	2 years after superseded	Destroy	Institutional business requirement.
Authorisation of recruitment	2 years after completion of recruitment	Destroy	Institutional business requirement.
Advertising details	6 months after completion of recruitment (or 1 year after end of sponsorship if individual hired is sponsored)	Destroy	Immigration, Asylum and Nationality Act 2006, Prescription and Limitation (Scotland) Act 1973, The Equality Act 2010.
Records documenting enquiries about vacancies & requests for application forms	6 months after completion of recruitment (or 1 year after end of sponsorship if individual hired is	Destroy	Institutional business requirement, Immigration, Asylum and Nationality Act 2006, Prescription and Limitation (Scotland) Act 1973, The Equality Act 2010.

	sponsored)		
Applicant tracking form	6 months after completion of recruitment (or 1 year after end of sponsorship if individual hired is sponsored)	Destroy	Institutional business requirement, Immigration, Asylum and Nationality Act 2006, Prescription and Limitation (Scotland) Act 1973, The Equality Act 2010.
Appointment request authorisation	2 years after completion of recruitment	Destroy	Institutional business requirement.
Unsuccessful candidates: application forms, CVs, references, interview notes, correspondence and related papers	6 months after completion of recruitment (or 1 year after end of sponsorship if individual hired is sponsored)	Destroy	Information Commissioner: Employment Practice Code Part 1: Recruitment and Selection (1.7.5), Immigration, Asylum and Nationality Act 2006, Prescription and Limitation (Scotland) Act 1973, The Equality Act 2010.

including notes from all interview panel members			
Online application form	1 year after last login date to the applicant portal (or 1 year after end of sponsorship if individual hired is sponsored)	Destroy	Institutional business requirement, Immigration, Asylum and Nationality Act 2006, Prescription and Limitation (Scotland) Act 1973, The Equality Act 2010.
Successful candidates: application form, CV, offer and acceptance letters	6 years after termination of employment	Destroy	Prescription and Limitation (Scotland) Act 1973

Successful candidates: right to work documentation	3 years after termination of employment	Destroy	Prescription and Limitation (Scotland) Act 1973
Successful candidates: PVG documentation	6 years after termination of employment	Destroy	Prescription and Limitation (Scotland) Act 1973
Successful candidates: Tier 2 visa documentation (Correspondence from Home Office and then a copy of tier 2 visa)	6 years after termination of employment	Destroy	Prescription and Limitation (Scotland) Act 1973
Successful candidates: all other recruitment documentation (including references)	6 months after vacancy filled (or 1 year after end of sponsorship if individual hired is sponsored)	Destroy	Immigration, Asylum and Nationality Act 2006, Prescription and Limitation (Scotland) Act 1973, The Equality Act 2010.
Remuneration and Reward			
Records documenting an employee's remuneration and rewards (e.g. discretionary increments, promotions boards)	6 years after creation	Destroy	Prescription and Limitation (Scotland) Act 1973 Taxes Management Act 1970 c. 9 s 34
Grievances			
Records documenting grievances raised by staff (which do not relate directly to their own contracts of employment), the University's response, action taken and the outcome	6 years after last action on file	Destroy	Prescription and Limitation (Scotland) Act 1973
Employee Contract Management			
Terms and conditions including offers, written particulars, contracts and variations	6 years after termination of employment	Destroy	Prescription and Limitation (Scotland) Act 1973

Records recording an employee's training and development needs, and the action taken to meet these needs	6 years after termination of employment	Destroy	Institutional business requirement.
Records documenting job-specific statutory/regulatory training requirements for an employee (e.g. health and safety training or fire safety training for fire wardens), and the training provided to meet these requirements	6 years after termination of employment	Destroy	Institutional business requirement, Health and Safety (First Aid) Regulations 1981.
Records documenting routine assessments of an employee's performance, and any consequent action taken	6 years after termination of employment	Destroy	Institutional business requirement.
Records documenting performance management proceedings	6 years after the end of the process		Institutional business requirement.
Records documenting disciplinary proceedings against an employee	6 years after termination of employment.	Destroy	Chartered Institute of Personnel and Development recommends '6 years after employment ceases'.
Records documenting grievances raised by an employee which relate directly to his/her own contract of employment, the institution's response, action taken and the outcome	6 years after termination of employment.	Destroy	Chartered Institute of Personnel and Development recommends '6 years after employment ceases'.
Flexible working requests	18 months following any appeal.	Destroy	CIPD

Redundancy details, calculations of payments, refunds, notification to the Secretary of State	6 years from the date of redundancy.	Destroy	CIPD
Records relating to special category or personal data consents (including Equal opportunities monitoring)	6 years after termination of employment or when superseded	Destroy	
Termination of employment, for example early retirement, severance or death in service	6 years after termination of employment.	Destroy	ICO
Records relating to the administration of an employee's contractual holiday entitlement	6 years after termination of employment	Destroy	Institutional business requirement.
Records documenting an employee's absence due to sickness	6 years after termination of employment	Destroy	The Statutory Sick Pay (Maintenance of Records) (Revocation) Regulations 2014 (SI 2014/55). Prescription and Limitation (Scotland) Act 1973
Records documenting the authorisation and administration of special leave	Current holiday year + 1	Destroy	

Records documenting the authorisation and administration of statutory leave entitlements, e.g. parental leave	6 years from completion of entitlement	Destroy	Institutional business requirement.
Records documenting entitlements to, and calculations of, statutory family leave and associated pay	3 years after the end of the tax year in which the period ends.	Destroy	The Statutory Maternity Pay (General) Regulations (SI 1986/1960 Regulation 26)

Records containing an employee's current basic personal details (e.g. address, next of kin, emergency contacts)	When superseded	Destroy	Institutional business requirement.
Records documenting an employee's termination of employment	6 years after termination of employment	Destroy	Prescription and Limitation (Scotland) Act 1973
References provided in support of an employee's application(s) for employment by another organisation	1 year after provision of reference	Destroy	Institutional business requirement.
Working time records including overtime, annual holiday, time off for dependents, opt outs etc	6 -7 years after termination of employment	Destroy	The Working Time Regulations 1998 (SI 1998/1833) and Employment Rights Regulations 2023.
Miscellaneous			
Collective agreements	Indefinitely	Destroy	CIPD
Trade union agreements	Recommended period: 10 years after ceasing to be effective.	Destroy	CIPD
Employee forum/Trade union minutes	Permanently	N/a	CIPD
Occupational Health Records			
Pre-Employment Health Screening	6 years after termination of employment * For those on annual contracts these records can be destroyed on receipt of the next screening form.	Destroy	Prescription and Limitation (Scotland) Act 1973
Occupational Health Notes	6 years after termination of employment	Destroy	

Health Surveillance (with additional records)	6 years after termination of employment *Records relating to employees who are having health surveillance for spirometry (lung function only) should be retained for 40 years after termination of employment.	Destroy	Control of Substances Hazardous to Health Regulations
Payroll and Pensions			
Copy payslips, payroll year end prints, Salaries - cumulative listings,	End of current tax year + 6 years	Destroy	Income Tax (Employments Regulations) S.I. 1993 / 744; National Minimum Wage Regulations S.I. 1999 / 584; Taxes Management Act 1970; Prescription and Limitation (Scotland) Act 1973 c.52
Timesheets, monthly payroll prints	End of current tax year + 7 years	Destroy	Income Tax (Employments Regulations) S.I. 1993 / 744; National Minimum Wage Regulations S.I. 1999 / 584; Taxes Management Act 1970; Prescription and Limitation (Scotland) Act 1973 c.52
Payroll wage/salary records (also overtime, bonuses, expenses, benefits in kind)	End of employment + 6 years	Destroy	Taxes Management Act 1970.

P45 (Income tax - employee leaving)	End of employment + 6years	Destroy	Taxes Management Act 1970
P60	End of current year + 6years	Destroy	Taxes Management Act 1970
Income tax and NI returns, income tax records and correspondence with HMRC	Not less than 3 years after the end of the relevant financial year.	Destroy	The Income Tax (Employments) Regulations 1993 (SI 1993/744) as amended.
National minimum wage records	6 years after the end of the pay reference period following the one that the records cover.	Destroy	National Minimum Wage Act 1998 and The National Minimum Wage (Amendment) Regulations 2021.
Bank details	Bank details should be deleted as soon after the end of employment as possible once final payments have been made.	Destroy	
Statutory Sick Pay scheme records	End of current tax year + 6 years	Destroy	The Statutory Sick Pay (Maintenance of Records) (Revocation) Regulations 2014 (SI 2014/55).
Statutory family leave scheme and pay records	End of current tax year + 6 years	Destroy	Statutory Maternity Pay (General) Regulations S.I. 1986 / 1960 as amended by SI 2005 No 989
Employer and employee pension scheme contributions; individual membership of	Death of last known beneficiary of the member + 12 years	Destroy	The Retirement Benefits Schemes (Information Powers) Regulations 1995 s.15 (SI 1995/3103)

pension schemes and changes to employment details that affect pensions.			
Job Evaluation			
Working papers from large-scale job evaluation exercises	3 years after completion of exercise	Destroy	Institutional business requirement.

Results of large-scale job evaluation exercises	3 years after completion of exercise	Destroy	Institutional business requirement.
Student Wellbeing			
Records of students 'interaction with the counselling and disability services: case notes, letters and other evidence etc.	6 years from last action	Destroy	Prescription and Limitation (Scotland) Act 1973