Human Resources Records Retention Schedule

Record Group Name Recruitment	Records within Group	Retention Period	Citation	Action at end of retention period	Where information to be retained	Notes
Successful applicants	CV/application form/academic profile Successful applicant profile Engagement Form Proof of HESA number Pre-employment checks Interview notes and panel wash up form Approved request to appoint Offer details Pre-employment form Copy of qualifications Relocation agreements References Job description/person specifications ID New starter checklist Pre-employment health questionnaire	End of employment + 6 years Research Grants If directly allocated or directly indicated staff costs retention period may need to be longer due to audit requirements	Limitation Act 1980	HR: Review Not involved in a research grant: Destroy Involved in a research grant: Determine retention period, dependent on funder. ERS anonymise through e- Ploy	Whilst employed: HR /Department Following end of employment: HR-Personnel Files and Core HR only Department to pass to HR for retention once no longer employed.	

Record Group	Records within Group	Retention	Citation	Action at	Where	Notes
Name		Period		end of	information	
				retention	to be	
				period	retained	

Health Management Report/Occupational Health Records (from OH provider) Record Group Records within Group Retention Citation Action at Where Name Period end of information retention to be period

Record Group Name	Records within Group	Retention Period	Citation	Action at end of retention period	Where information to be retained	Notes over the last
Unsuccessful applicants	Unsuccessful applicant interview notes and panel wash up form	3 months after interview		Delete	Recruiting Department	12 months. Email sent from HRto departments asking them to delete information
End of Fixed Term Contract/Redundancy/ Resignation	Acceptance of Resignation letter Death in Service End of FTC confirmation letter Exit interview notes Notification of FTC not being extended End of FTC consultation Notification of resignation/redundancy Redundancy letters Redundancy calculation sheets	End of employment + 6 years See above for DA or DI staff costed into research grants	Limitation Act 1980	Review See above	HR-Personnel Files and Core HR	

Record Group Records within Group Retention Citation Action at Name Period end of retention

Record Group	Records within Group	Retention	Citation	Action at	Where	Notes
Name	1 Records Within Group	Period	Citation	end of	information	Notes
Name		Period				
				retention	to be	
				period	retained	
			The Statutory Sck			
			Pay (Maintenance of			
			Records)			
			(Revocation)			
			Regulations 2014 (Sl 2014/55)			
			QPD advise end of			
			employment +6			
			years			
Payroll and Pension	ns		,	<u>I</u>		
Payroll	Payroll records relating to	End of	Limitation Act 1980	Delete	HR- Payroll	
	individuals e.g.	employment +6				
	P45/46	years				
	Change of bank details					
	Claim form					
	Timesheets					
	Correspondence					
	Leaver notifications					
	(hourly paid staff)					
	Overpayments					
	Overtime daim form					
	Payroll instruction					
	Season ticket loan form					
	Staff Ioan form					

Record Group Records within Group Retention Citation Action at Where Name Period end of retention period

Γ	Record Group	Records within Group	Retention	Citation	Action at	Where	Notes
	Name	Records Within Group	Period	Ortation	end of	information	110103
	Name		renou				
					retention	to be	
					period	retained	
		letter/email	'			'	· •
		Change to 50/50 scheme					
		form					
		Change to main scheme					
		form					
		Member request/query					
		Leaver form					
		Opt-in form					
		Opt-out form					
		Retirement information					
		Notification to pensions					
		of					
		retirement					
		AVCs (LGPS, USS,					
		Prudential)Pru3.41 144.02					