

# Upward Mobility's Data Retention Schedule

last updated by VB on 29-11-19

Record	Retention period
Accident reports	At least 5 years after date of last entry
Payroll records	7 years from financial year-end in which payments were made
Stat. maternity, adoption & paternity pay records	3 years after end of tax year it relates to
Stat. sick pay records	3 years after end of tax year it relates to
Working time opt-out forms	2 years from date on which they were made
National minimum wage records	3 years beginning with the day upon which the pay reference period immediately following that to which they relate, ends
Retirement benefits schemes - notifiable events i.e. relating to incapacity	6 years from end of scheme year in which event took place
PVG information needed for making application	not retained unless passport is used for identification, as it forms part of 'right to work' documents which are retained for 2 years after employment ceases.
PVG certificate	shredded immediately after being viewed and number logged. If further HR input is needed, it will be retained until matter is resolved and then shredded.
Application forms/interview notes for unsuccessful candidates	6 months after notifying unsuccessful candidates
Staff exit interviews	up to 6 years after employment ceases
Staff documents (i.e. supervision minutes, appraisal minutes, file notes, correspondence, training certificates, employment records, references, medical information/questionnaires)	While employment continues and up to 6 years after employment ceases
Staff details on Zero	While employment continues and up to 6 years after employment ceases
Staff details on Peopleplanner	While employment continues and up to 6 years after employment ceases
Health & safety records of consultations i.e. meetings with HSE, LF&R, Environmental Health, etc.	permanently
Parental leave taken	While employment continues and up to 6 years after employment ceases
Pension contributions	7 years after employment ceases, kept as part of payroll
Disciplinary, working time and training records	While employment continues and 6 years after employment ceases for disciplinary and training records. 3 years after relevant period for working time records
Redundancy details	7 years after employment ceases, kept as part of payroll
Managing Director's records	permanently for historical purposes
Trade union agreements	7 years after employment ceases for collective workforce agreements & past agreements that could affect present employees
Minutes of trustee/work council meetings	permanently
'Right to work' documents	2 years after employment ceases
Student enrolment paperwork (i.e. self-assessment, supporting transition documents, care-nap/social work assessments)	2 years after service terminates (or in case of death of a student)
student information collected during enrolment/visits for students who then do not take up placement at Upmo	immediately
Student enrolment paperwork (i.e. self-assessment, supporting transition documents, care-nap/social work assessments) for those who are on the waiting list to attend Upmo	1 year
Student UPMO support documents (i.e. support plan, risk assessments, individual learning & progress/1-1 reports, correspondence relating to students, medication records, complaints outcomes and actions)	2 years after service terminates (or in case of death of a student)
Incident/accident reports for students	5 years after service terminates (or in case of death of a student)
Student records on Peopleplanner	2 years after service terminates (or in case of death of a student)
Student exit interviews	2 years after service terminates (or in case of death of a student)
Workshop registers (paper copies)	1 year
Workshop registers (scanned copies)	1 year
Workshop paperwork (i.e. evaluations and block plannings, lesson plans, etc.)	2 years
Risk assessments for workshops/activities	5 years *
Fire and emergency procedures, fire drills and alarm tests	5 years
Maintenance of equipment records	5 years
Records of medicines kept on premises	5 years
Medication error report forms	5 years

\* claims for personal injury can be made up to 3 years after the event, and damage to property claims up to 5 years after the event.