

## **MCHFT schedule for the retention of staff data**

	<b>Retention period</b>
<ul style="list-style-type: none"><li>• <b>Applications</b><ul style="list-style-type: none"><li>○ Application forms</li><li>○ Evidence of right to work</li><li>○ Security checks</li><li>○ Recruitment documentation</li><li>○ Job adverts</li><li>○ Job evaluation paperwork</li><li>○ Public appointment assessors' records</li><li>○ Offer letters</li><li>○ Unsuccessful applications</li></ul></li></ul>	<ul style="list-style-type: none"><li>6 years from end of employment</li><li>6 years from end of employment</li><li>6 years from end of employment</li><li>6 years from end of employment</li><li>6 years from end of employment</li><li>6 years from end of employment</li><li>6 years from end of employment</li><li>6 years from end of employment</li><li>1 year from notification of unsuccessful application</li></ul>
<ul style="list-style-type: none"><li>• <b>Employment records:</b><ul style="list-style-type: none"><li>○ Contract of employment</li><li>○ Changes to terms and conditions</li><li>○ Details of work-related injuries</li><li>○ Details of any exposure to hazardous materials<sup>1</sup> including place of work</li><li>○ New starters and leavers forms and checklists</li><li>○ Disciplinary hearing outcome letters</li></ul></li></ul>	<ul style="list-style-type: none"><li>6 years from end of employment</li><li>6 years from end of employment</li><li>6 years from end of employment</li><li>Until employee's 75th birthday</li><li>6 years from end of employment</li><li>For the period of the sanction given</li></ul>
<ul style="list-style-type: none"><li>• <b>Line Management Records</b><ul style="list-style-type: none"><li>○ Sick/fit notes</li><li>○ Annual leave records</li><li>○ Details of special and/or unpaid leave periods, e.g. maternity leave</li><li>○ PDR / appraisal / objective monitoring documentation</li><li>○ Capability management letters and action plans</li><li>○ Letters relating to sickness absence processes</li></ul></li></ul>	<ul style="list-style-type: none"><li>6 years from end of employment</li><li>6 years from end of employment</li><li>6 years from end of employment</li><li>6 years from end of employment</li><li>7 years from commencement of action</li><li>7 years from commencement of action</li></ul>
<ul style="list-style-type: none"><li>• <b>Occupational Health</b><ul style="list-style-type: none"><li>○ Occupational Health Reports</li><li>○ Vaccination data</li></ul></li></ul>	<ul style="list-style-type: none"><li>Until employee's 75th birthday</li><li>Until employee's 75th birthday</li></ul>

---

<sup>1</sup> (including Lead (Control of Lead at Work Regulations 1980), Asbestos (Control of 10.3 Asbestos at Work Regulations 1996), Compressed Air (Work in Compressed Air Regulations 1996), Radiation (Ionising Radiation Regulations 1985))

<ul style="list-style-type: none"> <li>• <b>Grievance and / or Disciplinary Case Records including letters related to sanctions, sickness warnings, disciplinary sanctions and capability action plans.</b></li> </ul>	6 years from end of employment
<ul style="list-style-type: none"> <li>• <b>Individual Pension Records</b></li> </ul>	Until employee's 100th birthday
<ul style="list-style-type: none"> <li>• <b>Training records</b> <ul style="list-style-type: none"> <li>○ Clinical Training Records</li> <li>○ Statutory and Mandatory Training Records</li> <li>○ All other training records</li> <li>○ Programme evaluation and feedback</li> </ul> </li> </ul>	Until employee's 75th birthday 10 years from completion of training 6 years from completion of training 6 years from data of record