



# RICHARD SOAN Roofing Services

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## RETENTION AND ERASURE POLICY

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### About these guidelines

These guidelines support the Company's Data Protection Policy.

The guidelines are intended to ensure that the Company processes personal data in the form of employment records in accordance with the personal data protection principles, in particular that:

- Personal data must be collected only for specified, explicit and legitimate purposes. It must not be further processed in any manner incompatible with those purposes.
- Personal data must be adequate, relevant and limited to what is necessary in relation to the purposes for which it is processed. When personal data is no longer needed for specified purposes, it is deleted or anonymised as provided by these guidelines.
- Personal data must be accurate and, where necessary, kept up to date. It must be corrected or deleted without delay when inaccurate.
- Personal Data must not be kept in an identifiable form for longer than is necessary for the purposes for which the data is processed.
- Personal Data must be secured by appropriate technical and organisational measures against unauthorised or unlawful processing, and against accidental loss, destruction or damage.
- The Data Protection Officer (DPO) is responsible for overseeing these guidelines. Any questions about the operation of the guidelines should be submitted to the DPO.



ISO 9001,  
ISO 14001,  
ISO 45001

Cert No. 24206

### **Location of employment records**

The Company's Financial Accountant holds employment records and can be contacted with any enquiries relating to your personal data.

### **Keeping information up to date**

The Company needs to ensure that your personal details are up to date and accurate.

When you first start working for the Company we record your name, address, next of kin and contact telephone details. In the event that any of these change you should inform the Company's Financial Accountant. You will be invited to review and update personal information on a regular basis.

These provisions are intended to complement the data subject rights referred to in the Data Protection Policy.

### **General principals on retention and erasure**

The Company's approach to retaining employment records is to ensure that it complies with the data

protection principles referred to in these guidelines and, in particular, to ensure that:

Employment records are regularly reviewed to ensure that they remain adequate, relevant and limited to what is necessary to facilitate you working for the Company.

Employment records are kept secure and are protected against unauthorised or unlawful processing and against accidental loss, destruction or damage. Where appropriate the Company uses anonymization to prevent identification of individuals.

When records are destroyed, whether held as paper records or in electronic format, the Company will ensure that they are safely and permanently erased.

### **Retention and erasure of recruitment documents**

The Company retains personal information following recruitment exercises to demonstrate, if required, that candidates have not been discriminated against on prohibited grounds and that recruitment exercises are conducted in a fair and transparent way.

The Company's candidate privacy notice advises candidates how long the Company expects to keep their personal information for, once a recruitment decision has been communicated to them. This is likely to be for six months from the communication of the outcome of the recruitment exercise which takes account of both the time limit to bring claims and for claims to be received by the Company.

Information relating to successful candidates will be transferred to their employment record with the Company. This will be limited to that information necessary for the working relationship and, where applicable, that required by law.

Following a recruitment exercise information, in both paper and electronic form, will be held by the Company's Financial Accountant. Destruction of that information will take place in

accordance with these guidelines.

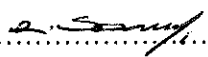
### **Retention and erasure of employment records**

The Company has regard to recommended retention periods for particular employment records set out in legislation, referred to in the table below. However, it also has regard to legal risk and may keep records for up to seven years (and in some instances longer) after your employment or work with us has ended.

| <b>Type of employment record</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | <b>Retention period</b>                                                           |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| Recruitment records<br><br>These may include:<br><br>Completed online application forms or CVs.<br><br>Equal opportunities monitoring forms.<br><br>Assessment exercises or tests.<br><br>Notes from interviews and short-listing exercises.<br><br>Pre-employment verification of details provided by the successful candidate. For example, checking qualifications and taking up references. (These may be transferred to a successful candidate's employment file.)<br><br>Criminal records checks. (These may be transferred to a successful candidate's employment file if they are relevant to the ongoing relationship.) | Six months after notifying candidates of the outcome of the recruitment exercise. |
| <b>Immigration checks</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Three years after the termination of employment.                                  |
| <b>Contracts</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                                                                                   |
| These may include:<br><br>Written particulars of employment.<br><br>Contracts of employment or other contracts.<br><br>Documented changes to terms and conditions.                                                                                                                                                                                                                                                                                                                                                                                                                                                               | While employment continues and for seven years after the contract ends.           |

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|--------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Collective agreements</b>                                                               |                                                                                                                                                                                                                                                                                       |
| Collective workforce agreements and past agreements that could affect present employees.   | Any copy of a relevant collective agreement retained on an employee's record will remain while employment continues and for seven years after employment ends.                                                                                                                        |
| <b>Payroll and wage records</b>                                                            |                                                                                                                                                                                                                                                                                       |
| Payroll and wage records<br>Details on overtime<br>Bonuses<br>Expenses<br>Benefits in kind | These must be kept for at least three years after the end of the tax year to which they relate. However, given their potential relevance to pay disputes they will be retained for seven years after employment ends.                                                                 |
| Current bank details                                                                       | Bank details will be deleted as soon after the end of employment as possible once final payments have been made                                                                                                                                                                       |
| PAYE records                                                                               | These must be kept for at least three years after the end of the tax year to which they relate. However, given their potential relevance to pay disputes they will be retained for seven years after employment ends.                                                                 |
| Records in relation to hours worked and payments made to workers                           | These must be kept for three years beginning with the day on which the pay reference period immediately following that to which they relate ends. However, given their potential relevance to pay disputes they will be retained for seven years after the working relationship ends. |
| Travel and subsistence.                                                                    | While employment continues and for seven years after employment ends.                                                                                                                                                                                                                 |
| Record of advances for season tickets and loans to employees                               | While employment continues and for seven years after employment ends.                                                                                                                                                                                                                 |
| <b>Personnel records</b>                                                                   |                                                                                                                                                                                                                                                                                       |
| These include:<br>Qualifications/references                                                | While employment continues and for seven years after employment ends.                                                                                                                                                                                                                 |

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| Consents for the processing of special categories of personal data<br>Annual leave records<br>Annual assessment reports<br>Disciplinary procedures<br>Grievance procedures<br>Death benefit nomination and revocation forms<br>Resignation, termination and retirement |                                                                                  |
| <b>Records in connection with working time</b>                                                                                                                                                                                                                         |                                                                                  |
| Working time opt-out                                                                                                                                                                                                                                                   | Three years from the date on which they were entered into.                       |
| Records to show compliance, including:<br>Time sheets for opted-out workers<br>Health assessment records for night workers                                                                                                                                             | Three years after the relevant period.                                           |
| <b>Maternity records</b>                                                                                                                                                                                                                                               |                                                                                  |
| These include:<br>Maternity payments<br>Dates of maternity leave<br>Period without maternity payment<br>Maternity certificates showing the expected week of confinement                                                                                                | Four years after the end of the tax year in which the maternity pay period ends. |
| <b>Accident records</b>                                                                                                                                                                                                                                                |                                                                                  |
| These are created regarding any reportable accident, death or injury in connection with work.                                                                                                                                                                          | For at least four years from the date the report was made.                       |

Signed.......... Date – 29<sup>th</sup> September 2026  
Richard Anthony Soan BEM - Managing Director