

EVERYDAY LEADER – PERSONAL DATA INVENTORY

WHY	WHO	WHAT			WHEN				WHERE	
		TYPE	SOURCE	LEGAL	ORIGINAL	UPDATED	RETENTION	DETERMINED		
Staff Admin	Staff & Associates	Name	Individual	Contract	Appointment	As required	6 years after termination unless ongoing litigation	Employment law	Manual records. HR files. Closed drive.	
		Address								
		Contact details								
		CV								
		Passport								
		DBS check	Third party	Safeguarding	Pre appointment	Kept live through update service		DBS code of practice		
		Appraisals	Individual	Legitimate interest. Staff management	At the time	Yearly		Standard practice	Manual records. HR files.	
		Disciplinary				As required				
		Tax/NI	Individual	Contract	Appointment	As required		Until person 100	Tax law	Xero online Scrutton Bland Payroll
		Bank account							Employment law	Scrutton Bland Payroll
Pension										
	Emergency contact	Name	Individual	Vital Interests	Appointment	As required	Until staff leave	Wellbeing	Manual records. HR files. Closed drive.	
	Contact details									
Direct marketing	Existing customers	Name	Individual	Consent of individual	First Contact	As required	End of relationship or until consent withdrawn	Data protection law	Paper copies Cloud server Drop box	
		Address								
		Email								
	Former customers	Name	Individual	Consent of individual	First Contact	As required		Data protection law		
		Address								
	Email									
Potential customers	Name	Third party		At the time	As required	Until not responded or consent withdrawn	Data protection law			
	Email									

GDPR documentation

Privacy notice