

Data Retention Policy

V2 February 2020

ID INSIGHT CONSULTING DATA RETENTION POLICY

Record Type	Maximum Retention Period	Reason
HR Records		
Right To Work in UK	2 years	Home Office requirement
Financial Records		
Accounting Records	7 years	https://www.gov.uk/running-a-limited-company/company-and-accounting-records https://www.gov.uk/vat-record-keeping
Income tax and NI returns, income tax records and correspondence with HMRC	Not less than 7 years after the end of the financial year to which they relate	Taxes Management Act 1970; The Income Tax (Employments) Regulations 1993 (SI 1993/744) as amended, for example by The Income Tax
Other	6 years	Statute of Limitations 1980
Clients Records		
Client Information – including personal data where agency is processor	To be agreed with Client by contract / agreement In absence of agreement delete data at earliest opportunity with consent of client Default is 6 months	n/a
Client Contracts	6 years (or less if agreement has time limit for claims)	Statute of Limitations 1980
Client Emails	6 years (or less if agreement has time limit for claims)	Statute of Limitations 1980
Supplier Records		
Supplier Contracts	6 years (or less if agreement has time limit for claims)	Statute of Limitations 1980
Supplier Emails	6 years (or less if agreement has time limit for claims)	Statute of Limitations 1980
All	6 years (or less if agreement has time limit for claims)	Statute of Limitations 1980
New Business		
Information received from prospective new clients in relation to pitches (and pitch is unsuccessful)	Amount of time specified in pitch documentation or if not specified, 1 year	Retention required in case subsequently selected and need to rely on materials
Property		
Leases	7 years	Tax
Incident Reports		
All Incident Reports e.g. IT Security Breach Report / logs	3 years from the date of the last entry	GDPR Compliance
IT Systems		
Office365* (Email, OneDrive, SharePoint, Teams) *Excluding Health US who have a 1-year retention policy in place	7 years	A global policy has been applied in Office365 to retain all data for seven years from the date it was created or modified (whichever is newest) or for email, the Any O365 data that is deleted by end-users is still recoverable by IT up to unless
QuestionPro	1 year maximum or on completion of project hosted	Annually renewable contract. Deletion of records from live surveys on platform once data downloaded to ID Insight and anonymised.
Research Records		
Survey data/ Sample (e.g. respondents recruited via panels and face to face)	1 year unless required (*e.g. see below) If possible encrypt or pseudonymise personally identifiable data asap	The need for back-checks, propensity for follow up research and the variable duration of research projects
Audio and Video Data	1 year unless required personally identifiable data asap	The need for back-checks, propensity for follow up research and the variable

* If we are running a once-a-year tracking study, data can be retained for 1.5 years for back-checking purposes.