

Data Retention Policy

1. Purpose

This policy ensures that personal and special category data is processed and retained in compliance with the UK General Data Protection Regulation (UK GDPR) and the Data Protection Act.

2. Types of Data Held & Retention Periods

Clinical Records for adults (i.e. formal session notes & assessments): Retained for 7 years following the end of the sessions. This timeframe aligns with standard professional indemnity insurance requirements and legal limitation periods.

For Clients Under 18: All formal records retained until the client reaches the age of 25.

Any personal working notes made: Retained temporarily and securely destroyed or deleted within 3 months of finishing working with the client.

Administrative Data (Contracts, Consent, Risk documentation): Retained for 7 years from the end of the service provided.

Enquiries and Unused Data: General enquiries that do not result in our services are deleted within 3 months of the final communication.

Financial/Accounting Records: Retained for 7 years in line with HMRC tax requirements.

Accredited Training Coursework: Retained for 6 years following the end of the financial year after the training has ended, in line with DFE retention guidance.

3. Data Storage

Physical Records: Stored in a locked office in a secured premises.

Electronic Records: Stored in password-protected, encrypted files, or on secure, GDPR-compliant cloud systems (e.g., end-to-end encrypted databases or encrypted drives).

4. Review and Disposal

Data is regularly reviewed to ensure it is only kept for the periods specified above. Once the retention period expires, records are securely destroyed or permanently anonymised:

Physical files: Disposed of securely, e.g. shredder.

Electronic files: Permanently deleted from drives and emptied from recycle bins.

5. Client Rights

Clients have the right to request access to their notes (Subject Access Request), request corrections, or request that their data be deleted. Requests must be responded to within 30 days.

We take the protection of your personal data seriously. If you believe we have not handled your personal data correctly, or you are unhappy with how we have used it, you have the right to complain directly to us. If you wish to do this, please use our Data Protection Complaints Policy document, which can be found on our website or by emailing us at info@excitingeducation.co.uk.

This policy was last reviewed July 2026