

GDPR Documentation

# Retention Schedule

**Version:** 1.0  
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## Version control

1.0 Modified version from IRMS Toolkit (Feb 2016) D Knight

# 1 Management of the school

## 1.1 GOVERNANCE

	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at Period End
1.1.1	Agendas for governance meetings	Potentially		One copy should be retained permanently with the master set of minutes.  All other copies can be disposed of.	SECURE DISPOSAL
1.1.2	Minutes of governance meetings	Potentially			
	<i>Master set (signed)</i>			PERMANENT	If we are unable to store these, offer to County Archives Service.
	<i>Inspection copies</i>			Academic year + 3 YEARS	If these contain any sensitive, personal information they must be shredded.
1.1.3	Reports presented at governance meetings	Potentially		Reports should be kept for 6 YEARS.  However, if the minutes refer directly to individual reports then the reports should be kept PERMANENTLY.	SECURE DISPOSAL or retain with the principal set of minutes.
1.1.4	Meeting papers relating to annual parents' meeting	No	<a href="#">Education Act 2002, s33</a>	Academic year + 6 YEARS	SECURE DISPOSAL
1.1.5	Instruments of Government, and Articles of Association	No		PERMANENT	Offer to County Archives Service when Trust closes

1.1 GOVERNANCE					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at Period End
1.1.6	Trusts and Endowments managed by Boards	No		PERMANENT	Offer to County Archives Service when Trust closes
1.1.7	Action plans created and administered by Boards	No		Life of action plan + 3 YEARS	SECURE DISPOSAL
1.1.8	Policy documents created and administered by Boards	No		Life of policy + 3 YEARS	SECURE DISPOSAL
1.1.9	Records relating to complaints dealt with by Boards	Yes		Date of complaint resolution + 6 YEARS, then REVIEW for further retention in case of contentious disputes.	SECURE DISPOSAL
1.1.10	Annual Reports	No	<a href="#">Education (Governor's Annual Reports) (England) (Amendment) Regulations 2002</a>	Academic year + 10 YEARS	SECURE DISPOSAL
1.1.11	Proposals concerning the change of status of a maintained school including Specialist Status Schools and Academies	No		Academic year + 3 YEARS	SECURE DISPOSAL

1.2 SENIOR MANAGEMENT					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at Period End
1.2.1	Log books of activity	Potentially		Date of last entry in the book + 6 YEARS, then REVIEW	These could be of permanent historical value and, if appropriate, should be offered to County Archives Service.
1.2.2	Minutes of senior management meetings and those of other internal administrative bodies	Potentially		Academic year + 3 YEARS, then REVIEW	SECURE DISPOSAL
1.2.3	Reports created by senior management teams	Potentially		Academic year + 3 YEARS, then REVIEW	SECURE DISPOSAL
1.2.4	Records created by senior management	Potentially		Academic year + 6 YEARS, then REVIEW	SECURE DISPOSAL
1.2.5	Correspondence created by senior management	Potentially		Date of correspondence + 3 YEARS, then REVIEW	SECURE DISPOSAL
1.2.6	Professional Development Plans	Yes		Life of the plan + 6 YEARS	SECURE DISPOSAL
1.2.7	School Development Plans	No		Life of the plan + 3 YEARS	SECURE DISPOSAL

1.3 ADMISSIONS PROCESS					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at Period End
1.3.1	All records relating to the creation and implementation of the School Admissions Policy	No	<a href="#">School Admissions Code</a>	Life of the policy + 3 YEARS, then REVIEW	SECURE DISPOSAL
1.3.2	Admissions – if successful	Yes	<a href="#">School Admissions Code</a>	Date of admission + 1 YEAR	SECURE DISPOSAL
1.3.3	Admissions – if unsuccessful	Yes	<a href="#">School Admissions Code</a>	Resolution of case + 1 YEAR	SECURE DISPOSAL
1.3.4	Register of Admissions	Yes	<a href="#">School attendance: guidance</a>	Every entry in the admission register must be preserved for a period of 3 YEARS after the date on which the entry was made	REVIEW Schools may wish to consider keeping the admission register permanently as schools often receive enquiries from past pupils to confirm dates they attended

1.3 ADMISSIONS PROCESS					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at Period End
1.3.5	Admissions – Secondary Schools – Casual	Yes		Academic year + 1 YEAR	SECURE DISPOSAL
1.3.6	Proofs of address supplied by parents as part of the admissions process	Yes	<a href="#">School Admissions Code</a>	Academic year + 1 YEAR	SECURE DISPOSAL
1.3.7	Supplementary Information form including additional information such as religion, medical conditions etc	Yes			
	<i>For successful admissions</i>			The information should be added to the pupil file	SECURE DISPOSAL
	<i>For unsuccessful admissions</i>			Until appeals process completed	SECURE DISPOSAL

1.4 OPERATIONAL ADMINISTRATION					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at Period End
1.4.1	General file series	No		Current year + 5 YEARS, then REVIEW	SECURE DISPOSAL
1.4.2	Records relating to the creation and publication of the school brochure or prospectus	No		Current year + 3 YEARS	STANDARD DISPOSAL
1.4.3	Records relating to the creation and distribution of circulars to staff, parents of pupils	No		Current year + 1 YEAR	STANDARD DISPOSAL
1.4.4	Newsletters and other items with a short operational use	No		Current year + 1 YEAR	STANDARD DISPOSAL
1.4.5	Visitors' Books and Signing in Sheets	Yes		Current year + 6 YEARS, then REVIEW	SECURE DISPOSAL
1.4.6	Records relating to the creation and management of Parent Teacher Associations and/or Old Pupils Associations	No		Current year + 6 YEARS, then REVIEW	SECURE DISPOSAL

## 2 Human resources

2.1 RECRUITMENT					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at Period End
2.1.1	All records leading up to the appointment of new Principal	Yes		Academic year + 6 YEARS	SECURE DISPOSAL
2.1.2	All records leading up to the appointment of new staff – unsuccessful candidates	Yes		Date of appointment of successful candidate + 6 MONTHS	SECURE DISPOSAL
2.1.3	All records leading up to the appointment of new staff – successful candidates	Yes		All relevant information should be added to the staff personnel file (see below) and all other information retained for 6 MONTHS	SECURE DISPOSAL
2.1.4	Pre-employment vetting information – DBS checks	No	<a href="#">DBS Update Service Employer Guide</a>  <a href="#">Keeping children safe in education</a>	The school does not have to keep copies of DBS certificates. If the school does so, the copy must NOT be retained for more than 6 MONTHS.	
2.1.5	Proofs of identity collected as part of the process of checking “portable” enhanced DBS disclosure	Yes		Where possible, these should be checked and a note kept of what was seen and what has been checked. If it is felt necessary to keep copy documentation, this should be placed on the staff member’s personnel file.	
2.1.6	Pre-employment vetting information – evidence proving the right to work in the United Kingdom	Yes	<a href="#">An employer’s guide to right to work checks</a>	These documents should be added to the staff personnel file (see below), but if they are kept separately then the Home Office requires that the documents are kept for termination of employment plus not less than 2 YEARS.	



## 2.2 OPERATIONAL STAFF MANAGEMENT

	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at Period End
2.2.1	Staff personnel file	Yes	<a href="#">Limitation Act 1980, s2</a>	Termination of employment + 6 YEARS	SECURE DISPOSAL
2.2.2	Timesheets	Yes		Current year + 6 YEARS	SECURE DISPOSAL
2.2.3	Annual appraisal records	Yes		Current year + 5 YEARS	SECURE DISPOSAL

## 2.3 MANAGEMENT OF DISCIPLINARY AND GRIEVANCE PROCESSES

	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at Period End
2.3.1	Allegation of a child protection nature against a staff member including where the allegation is unfounded	Yes	<a href="#">Keeping children safe in education</a> <a href="#">Working together to safeguard children</a>	Until the person's normal retirement age or 10 YEARS from the date of the allegation (whichever is longer), then REVIEW.  Allegations found to be malicious should be removed from personnel files. If substantiated, they are to be kept on file and a copy given to person concerned.	SECURE DISPOSAL These documents must be shredded
2.3.2	Disciplinary proceedings	Yes			
	<i>Written warning</i>			Date of warning + 12 MONTHS	SECURE DISPOSAL
	<i>Final warning</i>			Date of warning + 18 MONTHS	If warnings are placed on personnel files then they must be weeded from the file
	<i>Case not found</i>			If child protection incident then see above otherwise dispose of at conclusion of case	SECURE DISPOSAL

2.4 HEALTH AND SAFETY					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at Period End
2.4.1	Health and safety policy statements	No		Life of policy + 3 YEARS	SECURE DISPOSAL
2.4.2	Health and safety risk assessments	No		Life of risk assessment + 3 YEARS	SECURE DISPOSAL
2.4.3	Records relating to accident or injury at work	Yes		Academic year + 25 YEARS	SECURE DISPOSAL
2.4.4	Accident reporting	Yes	<a href="#">Social Security (Claims and Payments) Regulations 1979 Regulation 25</a> <a href="#">Social Security Administration Act 1992 s8</a> <a href="#">Limitation Act 1980</a>		
	<i>Adults</i>			Academic year + 25 YEARS	SECURE DISPOSAL
	<i>Children</i>			Academic year + 25 YEARS	SECURE DISPOSAL

2.4 HEALTH AND SAFETY					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at Period End
2.4.5	Control of substances hazardous to health (COSHH)	No	<a href="#">Control of Substances Hazardous to Health Regulations 2002 SI 2002 No 2677 Regulation 11.</a>  <a href="#">Records kept under the 1994 and 1999 Regulations to be kept as if the 2002 Regulations had not been made. Regulation 18 (2).</a>	Last entry + 40 YEARS	SECURE DISPOSAL
2.4.6	Process of monitoring areas where employees and persons are likely to have come in contact with asbestos	No	<a href="#">Control of Asbestos at Work Regulations 2012 SI 1012 No 632 Regulation 19</a>	Last action + 40 YEARS	SECURE DISPOSAL
2.4.7	Process of monitoring areas where employees and persons are likely to have come in contact with radiation	No		Last action + 50 YEARS	SECURE DISPOSAL
2.4.8	Fire precautions log book	No		Current year + 6 YEARS	SECURE DISPOSAL

2.5 PAYROLL AND PENSIONS					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at Period End
2.5.1	Maternity pay records	Yes	<a href="#">Statutory Maternity Pay (General) Regulations 1986 (SI1986/1960)</a> ,  <a href="#">revised 1999 (SI1999/567)</a>	Current year + 3 YEARS	SECURE DISPOSAL
2.5.2	Records held under Retirement Benefits Schemes (Information Powers) Regulations 1995	Yes		Current year + 6 YEARS	SECURE DISPOSAL

### 3 Financial management of the school

#### 3.1 RISK MANAGEMENT AND INSURANCE

	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at Period End
3.1.1	Employer's Liability Insurance Certificate	No		Closure of the school + 40 YEARS	SECURE DISPOSAL

#### 3.2 ASSET MANAGEMENT

	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at Period End
3.2.1	Inventories of furniture and equipment	No		Closure of the school + 6 YEARS	SECURE DISPOSAL
3.2.2	Burglary, theft and vandalism report forms	No		Closure of the school + 6 YEARS	SECURE DISPOSAL

**3.3 ACCOUNTS AND STATEMENTS INCLUDING BUDGET MANAGEMENT**

	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at Period End
3.3.1	Annual accounts	No		Current year + 6 YEARS	STANDARD DISPOSAL
3.3.2	Loans and grants managed by the school	No		Date of last payment + 12 YEARS, then REVIEW	SECURE DISPOSAL
3.3.3	Student grant applications	Yes		Current year + 3 YEARS	SECURE DISPOSAL
3.3.4	All records relating to the creation and management of budgets, including the annual budget statement and background papers	No		Life of the budget + 3 YEARS	SECURE DISPOSAL
3.3.5	Invoices, receipts, order books and requisitions, delivery notices	No		Financial year + 6 YEARS	SECURE DISPOSAL
3.3.6	Records relating to the collection and banking of monies	No		Financial year + 6 YEARS	SECURE DISPOSAL
3.3.7	Records relating to the identification and collection of debt	No		Financial year + 6 YEARS	SECURE DISPOSAL

**3.4 CONTRACT MANAGEMENT**

	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at Period End
3.4.1	All records relating to the management of contracts under seal	No	<a href="#">Limitation Act 1980</a>	Last payment on contract + 12 YEARS	SECURE DISPOSAL
3.4.2	All records relating to the management of contracts under signature	No	<a href="#">Limitation Act 1980</a>	Last payment on the contract + 6 YEARS	SECURE DISPOSAL
3.4.3	Records relating to the monitoring of contracts	No	<a href="#">Limitation Act 1980</a>	Current year + 2 YEARS	SECURE DISPOSAL

**3.5 SCHOOL FUND**

	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at Period End
3.5.1	Cheque books	No		Current year + 6 YEARS	SECURE DISPOSAL
3.5.2	Paying in books	No		Current year + 6 YEARS	SECURE DISPOSAL
3.5.3	Ledger	No		Current year + 6 YEARS	SECURE DISPOSAL
3.5.4	Invoices	No		Current year + 6 YEARS	SECURE DISPOSAL
3.5.5	Receipts	No		Current year + 6 YEARS	SECURE DISPOSAL
3.5.6	Bank statements	No		Current year + 6 YEARS	SECURE DISPOSAL
3.5.7	Journey books	No		Current year + 6 YEARS	SECURE DISPOSAL

3.6 SCHOOL MEALS MANAGEMENT					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at Period End
3.6.1	Free school meals registers	Yes		Current year + 6 YEARS	SECURE DISPOSAL
3.6.2	School meal registers	Yes		Current year + 3 YEARS	SECURE DISPOSAL
3.6.3	School meal summary sheets	No		Current year + 3 YEARS	SECURE DISPOSAL



## 4 Property management

4.1 PROPERTY MANAGEMENT					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at Period End
4.1.1	Title deeds of properties belonging to school	No		PERMANENT These should follow the property unless it is registered with Land Registry	
4.1.2	Plans of property belonging to school	No		These should be retained as long as the building belongs to school and should be passed onto any new owners if the building is leased or sold	
4.1.3	Leases of property leased by or to school	No		Expiry of lease + 6 YEARS	SECURE DISPOSAL
4.1.4	Records relating to letting school premises	No		Financial year + 6 YEARS	SECURE DISPOSAL

4.2 MAINTENANCE					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at Period End
4.2.1	All records relating to maintenance of school carried out by contractors	No		Current year + 6 YEARS	SECURE DISPOSAL
4.2.2	All records relating to maintenance of school carried out by school employees, including log books	No		Current year + 6 YEARS	SECURE DISPOSAL

## 5 Pupil management

5.1 PUPIL EDUCATIONAL RECORD					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at Period End
5.1.1	Pupil Educational Record required by The Education (Pupil Information) (England) Regulations 2005	Yes	<a href="#">The Education (Pupil Information) (England) Regulations 2005</a>		
	<i>Primary</i>			Retain while the child remains at the primary school	<p>The file should follow the pupil when he/she leaves the primary school. This includes:</p> <ul style="list-style-type: none"> <li>• to another primary school</li> <li>• to a secondary school</li> <li>• to a pupil referral unit</li> </ul> <p>If the pupil dies while at primary school, send the file to the Local Authority to be retained for the statutory retention period.</p> <p>Primary schools do not ordinarily have sufficient storage space to store records for pupils who have not transferred in the normal way. It makes more sense to transfer the record to the Local Authority as it is more likely the pupil will request the record from there.</p>
	<i>Secondary</i>		<a href="#">Limitation Act 1980, s2</a>	Until pupil is at age 25 YEARS	SECURE DISPOSAL

5.1 PUPIL EDUCATIONAL RECORD					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at Period End
5.1.2	Examination results – pupil copies	Yes			
	<i>Public</i>			This information should be added to the pupil file	All uncollected certificates should be returned to the examination board
	<i>Internal</i>			This information should be added to the pupil file	
<p><b>The Independent Inquiry on Child Sexual Abuse is ongoing. In light of this, all records relating to child abuse should be retained. Once the Inquiry is completed, we will review this section to take into account any recommendations concerning record retention.</b></p>					
5.1.3	Child protection information held on pupil file	Yes	<a href="#">Keeping children safe in education</a> <a href="#">Working together to safeguard children</a>	If records relating to child protection issues are placed on the pupil file, place in a sealed envelope and then retain for the same period as the pupil file	SECURE DISPOSAL These records must be shredded
5.1.4	Child protection information held in separate files	Yes	<a href="#">Keeping children safe in education</a> <a href="#">Working together to safeguard children</a>	Until pupil is at age 25 YEARS, then REVIEW.	SECURE DISPOSAL These records must be shredded

5.2 ATTENDANCE					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at Period End
5.2.1	Attendance registers	Yes	<a href="#">School attendance: guidance</a>	Every entry in the attendance register must be preserved for 3 YEARS after the date on which the entry was made	SECURE DISPOSAL
5.2.2	Correspondence relating to authorised absence		<a href="#">Education Act 1996, s7</a>	Academic year + 2 YEARS	SECURE DISPOSAL

5.3 SPECIAL EDUCATIONAL NEEDS					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at Period End
5.3.1	SEN files, reviews and Individual Education Plans	Yes	<a href="#">Limitation Act 1980, s2</a>	Until pupil is at age 25 YEARS	REVIEW This is minimum. Some authorities keep SEN files longer to defend legal case.
5.3.2	Statement maintained under Section 234 of the Education Act 1990 and any amendments made to the statement	Yes	<a href="#">Education Act 1996</a> <a href="#">Special Educational Needs and Disability Act 2001, s1</a>	Until pupil is at age 25 YEARS  This would normally be retained on the pupil file	SECURE DISPOSAL unless document is subject to legal hold
5.3.3	Advice and information provided to parents regarding educational needs	Yes	<a href="#">Special Educational Needs and Disability Act 2001, s2</a>	Until pupil is at age 25 YEARS  This would normally be retained on the pupil file	SECURE DISPOSAL unless document is subject to legal hold
5.3.4	Accessibility strategy	Yes	<a href="#">Special Educational Needs and Disability Act 2001, s14</a>	Until pupil is at age 25 YEARS  This would normally be retained on the pupil file	SECURE DISPOSAL unless document is subject to legal hold

## 6 Curriculum management

6.1 STATISTICS AND MANAGEMENT INFORMATION					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at Period End
6.1.1	Curriculum returns	No		Current year + 3 YEARS	SECURE DISPOSAL
6.1.2	Examination results – school copy	Yes		Current year + 6 YEARS	SECURE DISPOSAL
	<i>SATs records</i>	Yes			
	<i>Results</i>			<p>The SATs results should be recorded on the pupil's educational file and will therefore be retained until the pupil is at age 25 YEARS</p> <p>The school may wish to keep a composite record of all whole year SATs results. These could be retained for current year + 6 YEARS to allow suitable comparison</p>	SECURE DISPOSAL
	<i>Examination papers</i>			These should be kept until any appeals/validation process is complete	SECURE DISPOSAL
6.1.3	Published Admission Number reports	Yes		Current year + 6 YEARS	SECURE DISPOSAL
6.1.4	Value Added and Contextual Data	Yes		Current year + 6 YEARS	SECURE DISPOSAL
6.1.5	Self-Evaluation Forms	Yes		Current year + 6 YEARS	SECURE DISPOSAL

6.2 IMPLEMENTATION OF CURRICULUM					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at Period End
6.2.1	Schemes of work	No		Current year + 1 YEAR	It may be appropriate to REVIEW these at the end of each YEAR and allocate a further retention period or SECURE DISPOSAL
6.2.2	Timetable	No		Current year + 1 YEAR	
6.2.3	Class record books	No		Current year + 1 YEAR	
6.2.4	Mark books	No		Current year + 1 YEAR	
6.2.5	Record of homework set	No		Current year + 1 YEAR	
6.2.6	Pupils' work	No		Where possible, pupils' work should be returned to the pupil at the end of the academic year. If this is not the school's policy then current year + 1 YEAR	SECURE DISPOSAL

## 7 Extra-curricular activities

7.1 EDUCATIONAL VISITS OUTSIDE THE CLASSROOM					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at Period End
7.1.1	Records created by schools to obtain approval to run an educational visit outside the classroom – primary	No	<a href="#">Outdoor Education Advisers' Panel National Guidance website</a> , especially <a href="#">s3: Legal Framework and Employer Systems</a> and <a href="#">s4: Good Practice</a> .	Date of visit + 14 YEARS	SECURE DISPOSAL
7.1.2	Records created by schools to obtain approval to run an educational visit outside the classroom – secondary	No	<a href="#">Outdoor Education Advisers' Panel National Guidance website</a> , especially <a href="#">s3: Legal Framework and Employer Systems</a> and <a href="#">s4: Good Practice</a> .	Date of visit + 10 YEARS	SECURE DISPOSAL
7.1.3	Parental consent forms for school trips where there has been no major incident	Yes		Conclusion of the trip	Although consent forms could be retained for DOB + 22 YEARS, the requirement for them being needed is low and most schools do not have the storage capacity
7.1.4	Parental consent forms for school trips where there has been a major incident	Yes	<a href="#">Limitation Act 1980, s2</a>	Until pupil is at age 25 YEARS The permission slips for all pupils on the trip need to be retained to show the rules had been followed for all pupils	

7.2 WALKING BUS					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at Period End
7.2.1	Walking bus registers	Yes		Academic year + 3 YEARS  This takes into account the fact that, if there is an incident requiring an accident report, the register will be submitted with the accident report and kept for the period required for accident reporting	SECURE DISPOSAL

7.3 FAMILY LIAISON OFFICERS AND HOME SCHOOL LIAISON ASSISTANTS					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at Period End
7.3.1	Day books	Yes		Current year + 2 YEARS, then REVIEW	
7.3.2	Reports for outside agencies – where the report has been included on the case file created by the agency	Yes		While child is attending school	
7.3.3	Referral forms	Yes		While the referral is current	
7.3.4	Contact data sheets	Yes		Current year, then REVIEW If contact inactive, destroy	
7.3.5	Contact database entries	Yes		Current year, then REVIEW If contact inactive, destroy	
7.3.6	Group registers	Yes		Current year + 2 YEARS	



## 8 Central government and local authority

8.1 LOCAL AUTHORITY					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at Period End
8.1.1	Secondary transfer sheets (primary)	Yes		Current year + 2 YEARS	SECURE DISPOSAL
8.1.2	Attendance returns	Yes		Current year + 1 YEAR	SECURE DISPOSAL
8.1.3	School census returns	No		Current year + 5 YEARS	SECURE DISPOSAL
8.1.4	Circulars and other information sent from the local authority	No		Operational use	SECURE DISPOSAL

  

8.2 CENTRAL GOVERNMENT					
	Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period	Action at Period End
8.2.1	OFSTED reports and papers	No		Life of the report, then REVIEW	SECURE DISPOSAL
8.2.2	Returns made to central government	No		Current year + 6 YEARS	SECURE DISPOSAL
8.2.3	Circulars and other information sent from central government	No		Operational use	SECURE DISPOSAL

## Appendix A: The pupil educational record

The following information should be included in the pupil educational record:

- The record of transfer if the pupil attended an early years setting
- Admission and application forms
- The most recent privacy notice
- Photography consent forms
- Years record
- Annual written reports to parents
- Record sheets for the National Curriculum and the agreed religious education syllabus
- Any information about a major incident or accident involving the pupil
- Any reports written about the pupil
- Any information about a special educational needs statement or an education, health and care plan, including support offered in relation to it
- Any relevant medical information, which should be stored in a clearly marked envelope
- Any child protection reports or disclosures, which should be stored in a clearly marked envelope
- Any information relating to fixed or permanent exclusions
- Any correspondence with parents or outside agencies relating to major issues
- Details of any complaints made by the parents or the pupil

The following information should not be included in the pupil record:

- Absence notes
- Consent forms for trips/outings – in the event of a major incident, these should be retained with the incident report rather than the pupil record
- Correspondence with parents about minor issues
- Accident forms – in the event of a major incident, a copy should be placed on the pupil file

When transferring the pupil record to another organisation:

- The record should not be weeded unless any files have already reached the end of their retention period
- Avoid sending files by post unless absolutely necessary, in which case they should be sent by registered post
- A list of files should be included for the receiving organisation to sign and return as confirmation of receipt

## Appendix B: The staff health record

The following information should be included in the staff health record:

- Identifying details – including forename and surname, gender, date of birth, permanent address and post code, and National Insurance number
- The date which the present employment started
- Recorded details of each health surveillance check – including the date it was carried out and by whom, the outcome, and the decision that was made

The following information should not be included in the staff health record:

- Confidential medical information