

St Joseph's RC Primary School  
Record Retention Schedule



We are children of God: we achieve, believe and care.

St Joseph's RC Primary School  
Record Retention Schedule

This retention schedule contains recommended retention periods for the different record series created and maintained by the school in the course of business. The schedule refers to all information regardless of the media in which it is stored i.e. paper based or electronic records.

The document refers to the terms **SECURE DISPOSAL** and **DISPOSAL**.

If you need to dispose of any records by **SECURE DISPOSAL**, the company Shred It is used and a certificate of disposal is issued. Or, for small amounts of shredding the office shredding machine is used.

Electronic data should be deleted in the usual way, however, if you are going to securely dispose of an entire external hard drive, USB drive, laptop or other device, these devices are sent to Omnicom who then provide a Certificate of Secure Disposal.

The document may reference data that has been entered into SIMS. This will be deleted by Capita.

When an entry is marked as **STANDARD DISPOSAL** then these records can be shredded internally.

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<b>1 Pupils Educational Record</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
1.1	<p>Pupil's Educational Record required by The Education (Pupil Information) (England) Regulations 2005 SI 2005 No. 1437</p> <p>The Education (Pupil Information) (England) Regulations 2005 SI 2005 No. 1437</p> <p>MIS</p>	Yes	The Education (Pupil Information) (England) Regulations 2005 SI 2005 No. 1437	Retain whilst the child remains at the primary school	<p>The file should follow the pupil when he/she leaves the primary school. This will include:</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> <li>• If the pupil dies whilst at primary school the file should be returned to the Local Authority to be retained for the statutory retention period.</li> </ul> <p>If the pupil transfers to an independent school, transfers to home schooling or leaves the country the file should be returned to the Local Authority to be retained for the statutory retention period. 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 that the pupil will request the record from the Local Authority</p>



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<b>1 Pupils Educational Record</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
1.2	Examination results – Pupil Copies	Yes		Sent home to parents in school report.	
1.3	Examination results – Internal Copies	Yes		This information should be added to the pupil file	
1.4	Child Protection information held on pupil paper file	Yes	“Keeping children safe in education Statutory guidance for schools and colleges 2018”; “Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children 2018”	If any records relating to child protection issues are placed on the pupil file, it should be in a sealed envelope and then retained for the same period of time as the pupil file.	The file should follow the pupil when he/she leaves the primary school. This will include: <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> <li>• If the pupil dies whilst at primary school the file should be returned to the Local Authority to be retained for the statutory retention period.</li> </ul> <p>Otherwise secure disposal.</p>

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<b>1 Pupils Educational Record</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
1.5	Child protection information held in electronic files	Yes	“Keeping children safe in education Statutory guidance for schools and colleges 201””; “Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children 201”	DOB of the child + 25 years then review This retention period was agreed in consultation with the Safeguarding Children Group on the understanding that the principal copy of this information will be found on the Local Authority Social Services record	The file should follow the pupil when he/she leaves the primary school and is automatically deleted. This will include: <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>
1.6	Attendance Registers	Yes	School attendance: Departmental advice for maintained schools, academies, independent schools and local authorities October 2014	Every entry in the attendance register must be preserved for a period of 3 years after the date on which the entry was made.	SECURE DISPOSAL
1.7	Correspondence relating to authorized absence		Education Act 1996 Section 7	Current academic year + 2 years	SECURE DISPOSAL

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<b>1 Pupils Educational Record</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
1.8	Special Educational Needs files, reviews and Individual Education Plans	Yes	Limitation Act 1980 (Section 2)	Date of Birth of the pupil + 25 years	The file should follow the pupil when he/she leaves the primary school. This will include: <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> <li>• If the pupil dies whilst at primary school the file should be returned to the Local Authority to be retained for the statutory retention period.</li> </ul>
1.9	Statement maintained under section 234 of the Education Act 1990 and any amendments made to the statement	Yes	Education Act 1996 Special Educational Needs and Disability Act 2001 Section 1	Date of birth of the pupil + 25 years.	The file should follow the pupil when he/she leaves the primary school. This will include: <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> <li>• If the pupil dies whilst at primary school the file should be returned to the Local Authority to be retained for the statutory retention period.</li> </ul>

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<b>1 Pupils Educational Record</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
1.10	Advice and information provided to parents regarding educational needs	Yes	Special Educational Needs and Disability Act 2001 Section 2	Date of birth of the pupil + 25 years	The file should follow the pupil when he/she leaves the primary school. This will include: <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> <li>• If the pupil dies whilst at primary school the file should be returned to the Local Authority to be retained for the statutory retention period.</li> </ul>
1.11	Accessibility Strategy	Yes	Special Educational Needs and Disability Act 2001 Section 14	Date of birth of the pupil + 25 years.	The file should follow the pupil when he/she leaves the primary school. This will include: <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> <li>• If the pupil dies whilst at primary school the file should be returned to the Local Authority to be retained for the statutory retention period.</li> </ul>

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<b>1 Pupils Educational Record</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
1.12	SIMS records	Yes		Review annually. Use the rest of this document to pick out which information can be safely deleted from student records.	The file should follow the pupil when he/she leaves the primary school. This will include: <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> <li>• If the pupil dies whilst at primary school the file should be returned to the Local Authority to be retained for the statutory retention period.</li> </ul>
1.13	SIMS network drive	Yes		Review annually. Use the rest of this document to pick out which information can be safely deleted from student records.	This will be deleted by Capita.

<b>2 Governing Body</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>

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<b>2 Governing Body</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
2.1	Agendas for Governing Body meetings	There may be data protection issues if the meeting is dealing with confidential issues relating to staff		Date of meeting + 6 years.	SECURE DISPOSAL
2.2	Minutes of Governing Body meetings	There may be data protection issues if the meeting is dealing with confidential issues relating to staff		Date of meeting + 6 years.	SECURE DISPOSAL
	Principal Set (signed)		Held by Local Authority.	PERMANENT	
	Inspection Copies			Date of meeting + 6 years	SECURE DISPOSAL
2.3	Reports presented to the Governing Body	There may be data protection issues if the report deals with confidential issues relating to staff		Date of meeting + 6 years	SECURE DISPOSAL
2.4					
2.5	Instruments of Government including Articles of Association	No	Held by the Local Authority.	PERMANENT	These should be retained in the school whilst the school is open and then offered to County Archives Service when the school closes.

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<b>2 Governing Body</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
2.6	Trusts and Endowments managed by the Governing Body	No		PERMANENT	These should be retained in the school whilst the school is open and then offered to County Archives Service when the school closes.
2.7	Action plans created and administered by the Governing Body	No		Date of meeting + 6 years	SECURE DISPOSAL
2.8	Policy documents created and administered by the Governing Body	No		Life of the policy + 3 years	SECURE DISPOSAL
2.9	Records relating to complaints dealt with by the Governing Body	Yes		Date of the resolution of the complaint + 6 years then review for further retention in case of contentious disputes	SECURE DISPOSAL
2.10	Annual Reports created under the requirements of the Education (Governor's Annual Reports) (England) (Amendment) Regulations 2002	No	Education (Governor's Annual Reports) (England) (Amendment) Regulations 2002 SI 2002 No 1171	Date of report + 10 years	
2.11	Proposals concerning the change of status of a maintained school including Specialist Status Schools and Academies	No		Date proposal accepted or declined + 6 years	SECURE DISPOSAL

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<b>3 Head Teacher &amp; Senior Management Team</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
3.1	Log books of activity in the school maintained by the Head Teacher	There may be data protection issues if the log book refers to individual pupils or members of staff			These are of permanent historical value and should be kept
3.2	Minutes of Senior Management Team meetings and the meetings of other internal administrative bodies	There may be data protection issues if the minutes refers to individual pupils or members of staff		Date of the meeting + 6 years.	SECURE DISPOSAL
3.3	Reports created by the Head Teacher or the Management Team	There may be data protection issues if the report refers to individual pupils or members of staff		Date of the report + 6 years.	SECURE DISPOSAL
3.4	Records created by head teachers, deputy head teachers, heads of year and other members of staff with administrative responsibilities	There may be data protection issues if the records refer to individual pupils or members of staff		Current academic year + 6 years.	SECURE DISPOSAL
3.5	Correspondence created by head teachers, deputy head teachers, heads of year and other members of staff with administrative responsibilities	There may be data protection issues if the correspondence refers to individual pupils or members of staff		Current academic year + 6 years.	SECURE DISPOSAL

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<b>3 Head Teacher &amp; Senior Management Team</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
3.6	Professional Development/Performance Management Plans	Yes		Life of the plan + 6 years	SECURE DISPOSAL
3.7	School Development Plans	No		Life of the plan + 6 years	SECURE DISPOSAL
3.8	All records relating to the creation and implementation of the School Admissions' Policy	No	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels December 2014	Date of the policy + 7 years	SECURE DISPOSAL

<b>4 Admissions Process</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
4.1	All records relating to the creation and implementation of the School Admissions' Policy	No	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels December 2014	Date of the policy + 7 years.	SECURE DISPOSAL

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<b>4 Admissions Process</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
4.2	Admissions – if the admission is successful	Yes	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels December 2014	Date of admission + 1 year	SECURE DISPOSAL
4.3	Admissions – if the appeal is unsuccessful	Yes	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels December 2014	Resolution of case + 7 year	SECURE DISPOSAL
4.4					
4.5	Proofs of address supplied by parents as part of the admissions process	Yes	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels December 2014	Date of admission + 1 year	SECURE DISPOSAL
4.6	Supplementary Information form including additional information such as religion, medical conditions etc	Yes		Date of admission + 1 year	
	For successful admissions			This information should be added to the pupil file	SECURE DISPOSAL
	For unsuccessful admissions			Until appeals process completed	SECURE DISPOSAL

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<b>5 Operation Administration</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
5.1	General file series	No		Current year + 6 years	SECURE DISPOSAL
5.2	Records relating to the creation and publication of the school brochure or prospectus	Possibly (photos)		Current year + 6 years	STANDARD DISPOSAL
5.3	Records relating to the creation and distribution of circulars to staff, parents or pupils	No		Current year + 6 years	STANDARD DISPOSAL
5.4	Newsletters and other items with a short operational use	No		Current year + 6 years	STANDARD DISPOSAL OF MASTER COPY
5.5	Visitors' Books and Signing in Sheets	Yes		Current year + 6 years	SECURE DISPOSAL
5.6	Records relating to the creation and management of Parent Teacher Associations and/or Old Pupils Associations	No		Current year + 6 years	SECURE DISPOSAL
5.7	School website	Yes		Annually check that all pupil, governor, and staff leavers have been removed.	SECURE DISPOSAL
5.8	Teachers2Parents	Yes		On leaving the school. Annually check that all pupil, governor, and staff leavers have been removed.	SECURE DISPOSAL
5.9					

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<b>6 Recruitment</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
6.1	All records leading up to the appointment of a new headteacher	Yes		Date of appointment + 6 years	SECURE DISPOSAL
6.2	All records leading up to the appointment of a new member of staff – unsuccessful candidates	Yes		Date of appointment of successful candidate + 6 months	SECURE DISPOSAL
6.3	All records leading up to the appointment of a new member of staff – successful candidate	Yes		All the relevant information should be added to the staff personal file (see below) and all other information retained for 6 months	SECURE DISPOSAL
6.4	Pre-employment vetting information – DBS Checks	No	DBS Update Service Employer Guide June 2014: Keeping children safe in education. July 2015 (Statutory Guidance from Dept. of Education) Sections 73, 74	The school does not keep copies of DBS certificates.	
6.5	Proofs of identity collected as part of the process of checking “portable” enhanced DBS disclosure	Yes		These should be checked and a copy is placed on the member of staff’s personal file.	
6.6	Pre-employment vetting information – Evidence proving the right to work in the United Kingdom	Yes	An employer’s guide to right to work checks [Home Office May 2015]	These should be checked and a copy is placed on the member of staff’s personal file.	
6.7	Staff Personal File	Yes	Limitation Act 1980 (Section 2)	Termination of Employment + 6 years in terminated staff file.	SECURE DISPOSAL

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<b>7 Staff</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
7.1	Staff Personal File	Yes	Limitation Act 1980 (Section 2)	Termination of Employment + 6 years in terminated staff file.	SECURE DISPOSAL
7.2	Timesheets	Yes		Current year + 6 years	SECURE DISPOSAL
7.3	Annual appraisal/ assessment records – Performance Management	Yes		Current year + 6 years	SECURE DISPOSAL
7.4	SIMS records	Yes		Review annually.	Deleted by CAPITA
7.5	SIMS network drive	Yes		Review annually.	Deleted by CAPITA

<b>8 Management of Disciplinary and Grievance Processes</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>

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<b>8 Management of Disciplinary and Grievance Processes</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
8.1	Allegation of a child protection nature against a member of staff including where the allegation is unfounded	Yes	“Keeping children safe in education Statutory guidance for schools and colleges 2018”; “Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children 2018”	Until the person’s normal retirement age or 10 years from the date of the allegation whichever is the longer then REVIEW. Note allegations that are found to be malicious should be removed from personnel files. If found they are to be kept on the file and a copy provided to the person concerned.	SECURE DISPOSAL
8.2	Disciplinary Proceedings	Yes			
	oral warning			Date of warning + 12 months	SECURE DISPOSAL [If warnings are placed on personal files then they must be weeded from the file]
	written warning – level 1			Date of warning + 12 months	
	written warning – level 2			Date of warning + 12 months	
	final warning			Date of warning + 24 months	
	case not found			If the incident is child protection related then see above otherwise dispose of at the conclusion of the case	SECURE DISPOSAL

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Record Retention Schedule

<b>9 Health and Safety</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
9.1	Health and Safety Policy Statements	No		Life of policy + 3 years	SECURE DISPOSAL
9.2	Health and Safety Risk Assessments	No		Life of risk assessment + 3 years	SECURE DISPOSAL
9.3	Records relating to accident/ injury at work	Yes		Date of incident + 12 years In the case of serious accidents a further retention period will need to be applied	SECURE DISPOSAL
9.4	Accident Reporting	Yes	Social Security (Claims and Payments) Regulations 1979 Regulation 25. Social Security Administration Act 1992 Section 8. Limitation Act 1980		
	Adults			Date of the incident + 6 years	SECURE DISPOSAL
	Children			DOB of the child + 25 years	SECURE DISPOSAL
9.5	Control of Substances Hazardous to Health (COSHH)		Control of Substances Hazardous to Health Regulations 2002. SI 2002 No 2677 Regulation 11; Records kept under the 1994 and 1999 Regulations to be kept as if the 2002 Regulations had not been made. Regulation 18 (2)	Current year + 40 years	SECURE DISPOSAL
9.6	Process of monitoring of areas where employees and persons are likely to have become in contact with asbestos	No	Control of Asbestos at Work Regulations 2012 SI 1012 No 632 Regulation 19	Last action + 40 years	SECURE DISPOSAL



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Record Retention Schedule

<b>9 Health and Safety</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
9.7	Process of monitoring of areas where employees and persons are likely to have become in contact with radiation	No		Last action + 50 years	SECURE DISPOSAL
9.8	Fire Precautions log books	No		Current year + 6 years	SECURE DISPOSAL

<b>10 Payroll &amp; Pensions</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
10.1	Maternity pay records	Yes	Statutory Maternity Pay (General) Regulations 1986 (SI1986/1960), revised 1999 (SI1999/567)	Current year + 3 years	SECURE DISPOSAL
10.2	Records held under Retirement Benefits Schemes (Information Powers) Regulations 1995	Yes		Current year + 6 years	SECURE DISPOSAL

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Record Retention Schedule

<b>11 Risk Management and Insurance</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
11.1	Employer's Liability Insurance Certificate	No		Closure of the school + 40 years	Held by LA - SECURE DISPOSAL

<b>12 Asset Management</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
12.1	Inventories of furniture and equipment	No		Current year + 6 years	SECURE DISPOSAL
12.2	Burglary, theft and vandalism report forms	No		Current year + 6 years	SECURE DISPOSAL

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<b>13 Accounts and Statements including Budget Management</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
13.1	Annual Accounts	No		Current year + 6 years	STANDARD DISPOSAL
13.2	Loans and grants managed by the school	No		Date of last payment on the loan + 12 years then REVIEW	SECURE DISPOSAL
13.3					
13.4	All records relating to the creation and management of budgets including the Annual Budget statement and background papers	No		Life of the budget + 6 years	SECURE DISPOSAL
13.5	Invoices, receipts, order books and requisitions, delivery notices	No		Current financial year + 6 years	SECURE DISPOSAL
13.6	Records relating to the collection and banking of monies	No		Current financial year + 6 years	SECURE DISPOSAL
13.7	Records relating to the identification and collection of debt	No		Current financial year + 6 years	SECURE DISPOSAL

<b>14 Contract Management</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
14.1	All records relating to the management of contracts under seal	No	Limitation Act 1980	Last payment on the contract + 12 years	SECURE DISPOSAL
14.2	All records relating to the management of contracts under signature	No	Limitation Act 1980	Last payment on the contract + 6 years	SECURE DISPOSAL
14.3	Records relating to the monitoring of contracts	No		Current year + 2 years	SECURE DISPOSAL

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Record Retention Schedule

<b>15 School Fund</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
15.1	School Fund - Cheque books	No		Current year + 6 years	SECURE DISPOSAL
15.2	School Fund - Paying in books	No		Current year + 6 years	SECURE DISPOSAL
15.3	School Fund – Ledger	No		Current year + 6 years	SECURE DISPOSAL
15.4	School Fund – Invoices	No		Current year + 6 years	SECURE DISPOSAL
15.5	School Fund – Receipts	No		Current year + 6 years	SECURE DISPOSAL
15.6	School Fund - Bank statements	No		Current year + 6 years	SECURE DISPOSAL
15.7	School Fund – Journey Books	No		Current year + 6 years	SECURE DISPOSAL
15.8	Staff Insurance	No		Review annually	

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<b>16 School Meals Management</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
16.1	Free School Meals Registers/SIMs	Yes		Whilst on roll	Deleted of by CAPITA
16.2	School Meals Registers/SIMs	Yes		Whilst on roll	Deleted of by CAPITA
16.3	School Meals Summary Sheets	No		Current year + 3 years	SECURE DISPOSAL

<b>17 Property Management</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
17.1	Title deeds of properties belonging to the school	No		PERMANENT These should follow the property unless the property has been registered with the Land Registry	
17.2	Plans of property belong to the school	No		These should be retained whilst the building belongs to the school and should be passed onto any new owners if the building is leased or sold.	
17.3	Leases of property leased by or to the school	No		Expiry of lease + 6 years	SECURE DISPOSAL
17.4	Records relating to the letting of school premises	No		Current financial year + 6 years	SECURE DISPOSAL

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<b>18 Building Maintenance</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
18.1	All records relating to the maintenance of the school carried out by contractors	No		Current year + 6 years	SECURE DISPOSAL
18.2	All records relating to the maintenance of the school carried out by school employees including maintenance log books	No		Current year + 6 years	SECURE DISPOSAL

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19 Statistics and Management Information					
	Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record
19.1	Curriculum returns	No		Current year + 3 years	SECURE DISPOSAL
19.2	Examination Results (Schools Copy)	Yes		Current year + 6 years	SECURE DISPOSAL
19.3	SATS records –	Yes			
19.4	Results			The SATS results should be recorded on the pupil's educational file and will therefore be retained until the pupil reaches the age of 25 years. The school may wish to keep a composite record of all the whole year SATs results. These could be kept for current year + 6 years to allow suitable comparison	The file should follow the pupil when he/she leaves the primary school. This will include: <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> <li>• If the pupil dies whilst at primary school the file should be returned to the Local Authority to be retained for the statutory retention period. SECURE DISPOSAL of whole year SATs results file.</li> </ul>
19.5	Examination Papers			The examination papers should be kept until any appeals/validation process is complete	SECURE DISPOSAL
19.6	Published Admission Number (PAN) Reports	Yes		Current year + 6 years	SECURE DISPOSAL
19.7	Value Added and Contextual Data	Yes		Current year + 6 years	SECURE DISPOSAL
19.8	Self Evaluation Forms	Yes		Current year + 6 years	SECURE DISPOSAL

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<b>19 Statistics and Management Information</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
19.9	CES Census Returns	No		Current year + 6 years	SECURE DISPOSAL
19.20	The School Data Company/Anthony Conlin	Yes		DOB + 13 years.	SECURE DISPOSAL by A Conlin. Send a request to SDC asking for this data to be deleted securely.

<b>20 Implementation of Curriculum</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
20.1	Schemes of Work	No		Current year + 1 year	SECURE DISPOSAL
20.2	Timetable	No		Current year + 1 year	
20.3	Class Record Books	No		Current year + 1 year	
20.4	Mark Books	No		Current year + 1 year	
20.5	Record of homework set	No		Current year + 1 year	
20.6	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



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<b>21 Educational Visits outside the Classroom</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
21.1	Records created by schools to obtain approval to run an Educational Visit outside the Classroom – Primary Schools	No	Outdoor Education Advisers' Panel National Guidance website <a href="http://oeapng.info">http://oeapng.info</a> specifically Section 3 - "Legal Framework and Employer Systems" and Section 4 - "Good Practice".	Date of visit + 14 years	SECURE DISPOSAL by EVOLVE
21.2	Parental consent forms for school trips where there has been no major incident	Yes		Conclusion of the trip	SECURE DISPOSAL
21.3	Parental permission slips for school trips – where there has been a major incident	Yes	Limitation Act 1980 (Section 2)	DOB of the pupil involved in the incident + 25 years The permission slips for all the pupils on the trip need to be retained to show that the rules had been followed for all pupils	The consent forms will be retained for DOB + 25 years.

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<b>22 Walking Bus – N/A</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
22.1	Walking Bus Registers	Yes		Date of register + 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 of time required for accident reporting	SECURE DISPOSAL [If these records are retained electronically any back up copies should be destroyed at the same time]

<b>23 Family Liaison Officers and Home School Liaison Assistants – N/A</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
23.1	Day Books	Yes		Current year + 2 years then review	
23.2	Reports for outside agencies - where the report has been included on the case file created by the outside agency	Yes		Whilst child is attending school and then destroy	
23.3	Referral forms	Yes		While the referral is current	
23.4	Contact data sheets	Yes		Current year then review, if contact is no longer active then destroy	
23.5	Contact database entries	Yes		Current year then review, if contact is no longer active then destroy	
23.6	Group Registers	Yes		Current year + 2 years	

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<b>24 Local Authority</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
24.1	Secondary Transfer Sheets (Primary)	Yes		Current year + 2 years	SECURE DISPOSAL
24.2	Attendance Returns	Yes		Current year + 1 year	SECURE DISPOSAL
24.3	School Census Returns	No		Current year + 6 years	SECURE DISPOSAL
24.4	Circulars and other information sent from the Local Authority	No		Operational use	SECURE DISPOSAL

<b>25 Central Government</b>					
	<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
25.1	OFSTED reports and papers	No		Life of the report	SECURE DISPOSAL
25.2	Returns made to central government	No		Current year + 6 years	SECURE DISPOSAL
25.3	Circulars and other information sent from central government	No		Operational use	SECURE DISPOSAL

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26					
	Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record