

Whitefield Academy Records Retention Schedule

Introduction

Under the Freedom of Information Act 2000, the Academy is required to maintain a retention schedule listing the records which the Academy creates in the course of its business. The retention schedule lays down the length of time which the record needs to be retained and the action which should be taken when it is of no further administrative use.

Members of staff are expected to manage their current record keeping systems using the retention schedule and to take account of the different kinds of retention periods when they are creating new record keeping systems.

If there is an administrative need to keep a certain record for longer than that shown in the retention schedule then the Academy may do so (documenting the reason for such further retention).

The retention schedule refers to all information, regardless of the media in which they are stored.

Emails should not be used for storing records. Emails that constitute a record which needs to be retained, including those containing personal data must be stored in an appropriate filing system relevant to their confidentiality or criticality.

Shared drives or other unstructured information storage solutions, including cloud based storage, used to store any record should be managed in accordance with this schedule; however where those records contain personal data the retention periods must be followed.

All structured information management systems that store records containing personal data must be managed in accordance with this schedule. These systems must have a deletion or archival capability and where appropriate be able to identify a skeleton record (a subset of the original information) for continued retention.

Some of the retention periods are governed by statute. Others are guidelines following best practice. Every effort has been made to ensure that these retention periods are compliant with the requirements of the GDPR, Data Protection Act 2018 and the Freedom of Information Act 2000.

Managing record series using these retention guidelines will be deemed to be “normal processing” under the legislation mentioned above. If record series are to be kept for longer or shorter periods than laid out in this document the reasons for this need to be documented.

This schedule has been devised in association with the Records Management Society of Great Britain (Local Government Group).

This schedule will be reviewed on a regular basis.

Record Types / Process Content	Functions / Activities / Statutory provision	Retention Period	Retention Policy	Retention Period Starts	Lawful Basis for Processing Personal Data
Area FINANCE OFFICE-RECEPTION					
Land Registry Documents		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.	Archive	PERMANENT These should follow the property unless the property has been registered with the Land Registry	legal obligation
Master & Supplementary funding agreement	Transactional / 2010 Academies Act section 2	Current year + 6 years	SECURE DISPOSAL	Transaction date	Legal obligation
CCTV Recorded Memory	Safeguarding / Site security	28 days	Delete	Term after departure	Public interest, public task
Purchase Orders	Transactional / financial regulations	Current year + 6 years	SECURE DISPOSAL	Transaction date	Legal obligation
Purchase Invoices, delivery notes	Transactional / financial regulations	Current year + 1 year	SECURE DISPOSAL	Transaction date	Legal obligation
Bank Statements	Transactional / financial regulations	Current year + 6 years	SECURE DISPOSAL	Transaction date	Legal obligation
Payroll Files	Transactional/ financial regulations	Current year + 6 years	SECURE DISPOSAL	Term after departure from Academy	Legal obligation
Network Payroll Files on U and M drives	Transactional / financial regulations	Current year + 6 years	Delete	Term after departure from Academy	Legal obligation

Resource Level Top up Funding	Transactional	Current year + 6 years	Delete	Term after departure from Academy	under performance of a task carried out in the public interest or in the exercise of official authority
Network Resource Level Top up Funding on U and M drives	Transactional	Current year + 6 years	Delete	Term after departure from Academy	Public task
Sales Invoices/ remittance advices	Transactional / financial regulations	Current year + 6 years	SECURE DISPOSAL	Transaction date	Legal obligation
Petty cash Slips	Transactional / financial regulations	Current year + 6 years	SECURE DISPOSAL	Transaction date	Legal obligation
Payroll files/invoices/petty cash slips	Transactional / financial regulations	Current year + 6 years	SECURE DISPOSAL	Transaction date	Legal obligation
Pupil Lists	Limitation Act 1980	Electronic (SIMs): Date of birth of pupil +25 years - except for ethnicity/cultural information which is removed immediately on the child leaving school Paper: put in confidential waste daily	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Visitors log book	Record of Academy visitors with appointments / Safeguarding / Health & Safety	Current year + 2 years	SECURE DISPOSAL	Term after visit to Academy	Public task / Legal obligation
Visitors lists	Record of casual Academy visitors / Safeguarding / Health & Safety	Current year + 3 years	SECURE DISPOSAL	Term after visit to Academy	Public task / Legal obligation

Area:- CFO's Office					
Payroll files(Manual/electronic)	Contract pay / financial regulations	Current year + 6 years	SECURE DISPOSAL	Term after departure from Academy	legal obligation
Monthly Monitoring reports	Equalities	Current academic year + 6 years then review	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Correspondence files/EFA submissions/VAT Returns	financial regulations	Current year + 6 years	SECURE DISPOSAL	Term after departure from Academy	Public task / Legal obligation
Reports to Directors	Academy trust governance	Date of the report + a minimum of 3 years then review	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Trust policies	Academy trust governance	Life of the policy + 3 years then review	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Minutes of Directors	Academy trust governance	Date of the meeting + 3 years then review	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Memorandum of Association	DFe requirement	One copy should be retained with the master set. All other copies can be disposed of	SECURE DISPOSAL	Term after departure from Academy	Legal obligation
Articles of Association	DFe requirement	One copy should be retained with the master set. All other copies can be disposed of	SECURE DISPOSAL	Term after departure from Academy	Legal obligation
Lease- Joseph Clarke School		Permanent	Archive	Term after departure from Academy	Legal obligation

Area Classrooms – Joseph Clarke School					
Termly Information file	Limitation Act 1980	Electronic (SIMs): Date of birth of pupil +25 years - except for ethnicity/cultural information which is removed immediately on the child leaving school Paper: put in confidential waste daily	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Class Welcome File	Limitation Act 1980	Student's 25th birthday	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Medical care plans	Dfe statutory guidance Limitation Act 1980	Student's 25th birthday	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Pupil files containing PCR's / reports etc.	Limitation Act 1980	Electronic (SIMs): Date of birth of pupil +25 years - except for ethnicity/cultural information which is removed immediately on the child leaving school Paper: put in confidential waste daily	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Area: Admissions					
Pupils Referral Documents	Limitation Act 1980	Student's 25th birthday	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
SIMS Pupil Database	Limitation Act 1980	Date of birth of pupil +25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education

Phoenix Pupil Database	Limitation Act 1980	Date of birth of pupil +25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Area: General Office					
Pupils Files	Limitation Act 1980	Student's 25th birthday	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
SIMS Pupil Database	Limitation Act 1980	Student's 25th birthday	Delete	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Phoenix Pupil Database	Limitation Act 1980	Student's 25th birthday	Delete	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
PCR/APR/PSP Docs	Limitation Act 1980	Student's 25th birthday	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Safeguarding List	Limitation Act 1980	Student's 25th birthday	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Spreadsheet containing pupil's info	Limitation Act 1980	Student's 25th birthday	Delete	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Attendance Registers	Limitation Act 1980	Electronic (SIMs): Date of birth of pupil +25 years - except for ethnicity/cultural information	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for

		which is removed immediately on the child leaving school Paper: put in confidential waste daily			the function of public funded education
Area: PA Office					
Advisory Council Members/Director details	Academy trust governance	Retained for term as Council Member + 2 years	SECURE DISPOSAL	Term after departure from Academy	Public task
Advisory Council Members/Directors Address label	Academy trust governance	Retained for term as Council Member + 2 years	SECURE DISPOSAL	Term after departure from Academy	Public task
NPQML contact details	Academy trust governance	Retained for term as Council Member + 2 years	SECURE DISPOSAL	Term after departure from Academy	Public task
Pupils Absence Letters		Current academic year + 2 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Area: Past Pupil Files					
Leavers Files	Limitation Act 1980	Student's 25th birthday	SECURE DISPOSAL	Term after departure from school	Performance of a task carried out in the public interest for the function of public funded education
Area: Confidential Waste Bags					
Bags containing confidential documents	Confidential Waste disposal	Paper disposal - as records are no longer required	SECURE DISPOSAL	Upon collection	Public task
Area ___ Home Liaison Service					
Initial internal referral	Safeguarding Children in Education – 2004	DOB of child + 25 years or Date of referral	SECURE DISPOSAL	Term after departure from Academy	Legal obligation

Initial home visit report	Safeguarding Children in Education - 2005	Student's 25th birthday	SECURE DISPOSAL	Term after departure from Academy	Legal obligation
Record of home visit session	Safeguarding Children in Education - 2006	Student's 25th birthday	SECURE DISPOSAL	Term after departure from Academy	Legal obligation
Area: Website & Media					
Staff login information	Access to systems	Termination of employment, student leaving the school	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract
Photographs of students and staff		Termination of employment, student leaving the school	SECURE DISPOSAL	Term after departure from Academy	Consent
Area ____ HR					
Personal file	Limitation Act 1980 (section 2)	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	Legal obligation
Senior Leader personal files	Limitation Act 1980 (section 2)	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	Legal obligation
Appraisal documents (all staff)	Performance monitoring	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract
SLT Appraisals	Performance monitoring	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract
Disciplinary File	Record of disciplinary actions	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	Legal obligation
Parental leave application	Employment laws	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	Legal obligation
Sickness information	Financial regulations	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	Legal obligation
Recruitment process Application forms Shortlisting + interview notes for unsuccessful candidates	contractual obligation	Leaving date + 6 months	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract

Single central register	Safeguarding / Keeping children safe in education	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	Legal obligation
Sims – HR database	Limitation Act 1980 (section 2)	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	Legal obligation
Area __ Library					
Foundation Degree Students and staff records.		Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Area Safeguarding					
Reports from staff	Keeping children safe in education	Student's 25th birthday	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Reports from staff via safeguarding email	Keeping children safe in education	Student's 25th birthday	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Reports from staff – via Safeguard	Keeping children safe in education	Student's 25th birthday	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Letters from professionals	Keeping children safe in education	Termination of employment, student leaving the school	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Emails from professionals	Keeping children safe in education	Whilst child is attending school and then destroy	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education

Reports of investigations	Keeping children safe in education	Whilst child is attending school and then destroy	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Area Accident process					
Accident forms	Social Security (Claims and Payments) Regulations 1979 Regulation 25. Social Security Administration Act 1992 Section 8. Limitation Act 1980	DOB of child + 25 years or Date of incident + 6 years for Adults	SECURE DISPOSAL	Term after departure from Academy	Legal obligation
Accident form summary records		DOB of child + 25 years or Date of incident + 6 years for Adults	SECURE DISPOSAL	Term after departure from Academy	Legal obligation
Area: Joseph Clarke School Accident Forms					
Just handed in accident forms		DOB of child + 25 years or Date of incident + 6 years for Adults	SECURE DISPOSAL	Term after departure from Academy	Legal obligation
Accident forms – being processed		DOB of child + 25 years or Date of incident + 6 years for Adults	SECURE DISPOSAL	Term after departure from Academy	Legal obligation
One copy of completed accident forms - pupil		DOB of child + 25 years or Date of incident + 6 years for Adults	SECURE DISPOSAL	Term after departure from Academy	Legal obligation
One copy of completed accident forms – staff		DOB of child + 25 years or Date of incident + 6 years for Adults	SECURE DISPOSAL	Term after departure from Academy	Legal obligation

Copies of accident forms		DOB of child + 25 years or Date of incident + 6 years for Adults	SECURE DISPOSAL	Term after departure from Academy	Legal obligation
Area Complaints from staff and parents					
Printed copies of complaints and responses	Complaints recording	Retain for the time which the pupil remains at Academy	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Electronic copies of complaints and responses	Complaints recording	Retain for the time which the pupil remains at Academy	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Area Nursing					
Child health records	Supporting pupils with medical conditions	Retain for the time which the pupil remains at Academy and then transfer	SECURE DISPOSAL	Term after departure from Academy	Public task / Legal obligation
				Term after departure from Academy	
Area: Manager of project Search				Term after departure from Academy	
Pupil information – PCR / APR reports / EHC plans and related information	Supporting pupils with medical conditions	DOB of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Laptop – presentations	Supporting Project Search	Retain for the time needed for presentation	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education

Contact details of past and current Project SEARCH group	Supported internship programme	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Photos and videos	Promotion of supported internship programme	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	Consent
Email server	Allocating staff work email addresses	Termination of employment	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Planning and other paperwork related to curriculum	Dfe requirement	Current year + 3 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Curriculum paperwork and policies document	Dfe requirement	Current year + 3 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Safeguarding documentation	Limitation Act 1980	DOB of the child + 25 years then review This retention period was agreed in consultation with the Safeguarding Children Group	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Project SEARCH Interns interview details	Supported internship programme	All the relevant information should be added to the staff personal file and all other information retained for 6 months	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract
Intern personal information and job	Supported internship programme	All the relevant information should be added to the staff personal file and all other	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract

applications- Paper and online		information retained for 6 months			
Photographs	Support Project Search	All the relevant information should be added to the staff personal file and all other information retained for 6 months	SECURE DISPOSAL	Term after departure from Academy	Explicit consent
Project SEARCH Documents	Supported internship programme	All the relevant information should be added to the staff personal file and all other information retained for 6 months	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Area: Site Service Managers Office					
Accident/Riddor Reporting Forms	Social Security (Claims and Payments) Regulations 1979 Regulation 25. Social Security Administration Act 1992 Section 8. Limitation Act 1980	DOB of child + 25 years or Date of incident + 6 years for Adults	SECURE DISPOSAL	Term after departure from Academy	necessary for compliance with a legal obligation to which the controller is subject
Authorisation Forms. Copy of Downloaded CCTV Footage Images	Safeguarding – Limitation Act 1980	Date of birth of pupil +25 years	SECURE DISPOSAL	Term after departure from Academy	necessary for compliance with a legal obligation to which the controller is subject
Health and Safety Procedures Policies Reports	Health and Safety regulations	Life of policy + 3 years	SECURE DISPOSAL	Term after departure from Academy	necessary for compliance with a legal obligation to which the controller is subject

Contractors Specifications Work Sheets Details Certificates	Health and Safety regulations / School maintenance	Current year + 6 years	SECURE DISPOSAL	Term after departure from Academy	Legal obligation
Buildings Operational Manuals	Health & Safety regulations	These should be retained whilst the building belongs to the Academy and should be passed onto any new owners if the building is leased or sold.	SECURE DISPOSAL	Term after departure from Academy	Legal obligation
Area __Margaret Brearley, Peter Turner Primary & Niels Chapman Secondary__					
Pupil files	Limitation Act 1980	Electronic (SIMs): Date of birth of pupil +25 years - except for ethnicity/cultural information which is removed immediately on the child leaving school Paper: put in confidential waste daily	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Eating and Drinking guidelines (MBS)	Special Educational Needs and Disability Act 2001	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Moving and Handling guidelines (MBS)	Special Educational Needs and Disability Act 2001	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Behaviour - PPSP/Sensory profiles	Limitation Act 1980	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for

					the function of public funded education
Behaviour meeting minutes	Limitation Act 1980	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Welcome files -Medical needs -PPSP/Sensory profiles -Photo permissions	Limitation Act 1980	Student's 25th birthday	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Medical folder -Care plans for medical emergencies e.g. Epilepsy, anaphylaxis, asthma	Limitation Act 1980	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Home teaching reports	Monitoring pupils' progress	Where possible pupils' work should be returned to the pupil at the end of the academic year if this is not the Academy's policy then current year + 1 year	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Accident forms	Health & Safety regulations	Date of incident + 12 years In the case of serious accidents a further retention period will need to be applied	SECURE DISPOSAL	Term after departure from Academy	Legal obligation
Accident forms. Yellow carbon copies	Health & Safety regulations	Date of incident + 12 years In the case of serious accidents a further retention period will need to be applied	SECURE DISPOSAL	Term after departure from Academy	Legal obligation
Registers	Dfe requirement	Every entry in the attendance register must be preserved for a period of three years after	SECURE DISPOSAL	Term after departure from Academy	Legal obligation

		the date on which the entry was made.			
Observations	Dfe guidance	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Monitoring folders	Dfe guidance	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Curriculum Tracking documents	Dfe guidance	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
School information file -Class list -Pupil Premium & CLA -Ethnicity -Year group -Resource level -Staff M&H status Staff Dysphagia status -PCR/EHCP schedule -Pupils with Behaviour support -Pupil Dysphagia levels	Limitation Act 1980	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Learning journals (MBS)	Statutory framework for the early years foundation stage guidelines	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education

EYFS (PTP & MBS)	Statutory framework for the early years foundation stage guidelines	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Progress Files	Pupils's personal development programme	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
ASDAN evidence folders	Pupils' personal development programme	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Evidence for learning	Pupils' personal development programme	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Staffing concerns	Pupils' personal development programme	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Parental contact (letters)	Pupils' personal development programme	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Home school books	Pupils' personal development programme	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Old home school books	Pupils' personal development programme	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education

Progress meeting documents	Pupils' personal development programme	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
FALPS	Pupils' personal development programme	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Progress reports	Pupils' personal development programme	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Progress folders of leavers (Y14)	Pupils' personal development programme	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Medical Therapists Guidelines	Management of medical needs of students	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Pupil Referral Papers	Supporting pupils with medical needs	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Absence follow up notes	Supporting pupils with medical needs	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Teacher/Staff Application forms	CIPD guidance	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	Public task

Incident book	(Claims and Payments) Regulations 1979 Regulation 25. Social Security Administration Act 1992 Section 8. Limitation Act 1980	DOB of child + 25 years or Date of incident + 6 years for Adults	SECURE DISPOSAL	Term after departure from Academy	Legal obligation
Exam Papers (NCS)	Dfe requirement	This information should be added to the pupil file	SECURE DISPOSAL	Term after departure from Academy	Legal obligation
Area ___ Family Support Office					
Parent's contact details	Statutory requirement to establish parental responsibility	Retain for the time which the pupil remains at Academy	SECURE DISPOSAL	Term after departure from Academy	Legal obligation
Afterschool club children's names	Health & Safety / Safeguarding	Current academic year then dispose	SECURE DISPOSAL	Term after departure from Academy	Legal obligation
Attendance records and lists	DFe requirement / Limitation Act 1980	Electronic (SIMs): Date of birth of pupil +25 years - except for ethnicity/cultural information which is removed immediately on the child leaving school Paper: put in confidential waste daily	SECURE DISPOSAL	Term after departure from Academy	Legal obligation
Afterschool, Easter and Summer club, Permissions and medical details	Health & Safety / Safeguarding	Current academic year then dispose	SECURE DISPOSAL	Term after departure from Academy	Legal obligation
Details of local authority social workers, APRO, LADO	Operational use - Safeguarding	DOB + 25 years	SECURE DISPOSAL	Term after departure from Academy	Public task

Diaries	Operational use	Current year + 2 years then review	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Misc. Paperwork	Operational use	Current year then review, if contact is no longer active then destroy	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Lists of parents attendance at events	Operational use	Current year then review, if contact is no longer active then destroy	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Area Research & Development Centre NVQ/QCF					
Course Application forms	NVQ code of practice guidelines	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	Public task
Candidate folders/work (including CVs)	NVQ code of practice guidelines	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	Public task
Candidate QVF certificates (inc candidate reg. numbers)	NVQ code of practice guidelines	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	Public task
Area: R&D Centre Training					
School Direct Application forms (UCAS) - unsuccessful	Teaching school function	All the relevant information should be added to the staff personal file and all other information retained for 6 months	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Foundation Degree Application Forms (UCAS) - unsuccessful	Teaching school function	All the relevant information should be added to the staff personal file and all other	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for

		information retained for 6 months			the function of public funded education
Accepted Foundation Degree Applications for Sep 2018 (UCAS)	Teaching school function	All the relevant information should be added to the staff personal file and all other information retained for 6 months	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
School Direct files for current and past students (including students qualifications / DBS)	Teaching school function	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Current foundation degree students files (inc students qualifications / DBS / UCAS forms)	Teaching school function	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Midas file (driving) – staff details	Teaching school function	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract
Induction File (front copies of staff applications)	Teaching school function	All the relevant information should be added to the staff personal file and all other information retained for 6 months	SECURE DISPOSAL	Term after departure from Academy	necessary for the performance of a contract
Postgraduate and Foundation degree Folders from past students	Teaching school function	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Booking forms for courses Inc. name/school address	Teaching school function	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education

Letters to individuals regarding courses / invoices etc.	Teaching school function	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Email address and names of contacts from schools/settings on mailing lists	Teaching school function	Leaving date + 6 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Area__Assessment/Transport/CLA					
Behaviour data	Management of assessment data	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Annual review meetings	Management of assessment data	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Transport	Management of assessment data	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
CLA meetings	Management of assessment data	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Assessment/progress data/systems	Management of assessment data	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education

Area -Somewhere To Belong 12 week Pilot. March-May 2018 (0-3 provision/sessions)					
Early Years Developmental Journal	Management of assessment data	Current year + 1 year	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Play Session Targets and Outcomes	Management of assessment data	Current year + 1 year	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Area Deputies Offices- Joseph Clarke School					
Ongoing PCR documentation			SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Any current pupil documentation including medical reports, therapy reports,	Management of vulnerable students	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Area Mobility / SALT Office Joseph Clarke School					
Pupil Mobility records	Management of vulnerable students	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education

Ongoing Mobility programs	Management of vulnerable students	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
SALT records/notes	Management of vulnerable students	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Area Reprographics & Admin -Joseph Clarke School					
Pupil main files	Assessment data – Limitation Act 1980	Electronic (SIMs): Date of birth of pupil +25 years - except for ethnicity/cultural information which is removed immediately on the child leaving school Paper: put in confidential waste daily	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Free school meals documentation	Assessment data – financial regulations	Current year + 3 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Area Classrooms – Joseph Clarke School					
Termly Information file	Assessment data	Current year + 1 year	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Class Welcome File	Assessment data	Current year + 1 year	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for

					the function of public funded education
Medical care plans	Management of individual student health care needs	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Pupil files containing PCR's / reports etc.	Assessment data	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Area - Project SEARCH BARTs Trust					
Interview details Personal Details/Information Medical information EHCP Documents for HR	Assessment data	All the relevant information should be added to the staff personal file and all other information retained for 6 months	SECURE DISPOSAL	Term after departure from Academy	Public task
Safeguarding information	Assessment data – Limitation Act 1980	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Term after departure from Academy	Performance of a task carried out in the public interest for the function of public funded education
Office Camera	Assessment data – for portfolio	DOB + 25 years	SECURE DISPOSAL	Term after departure from Academy	Public task
Professional Photos CD	Assessment data – for portfolio	DOB + 25 years	SECURE DISPOSAL	Term after departure from Academy	Public task
Planning and Intern rotation updates	Assessment data	Current year + 1 year	SECURE DISPOSAL	Term after departure from Academy	Public task
Mass Storage Portal Hard drive Interns information past and present	Assessment data	Current year + 1 year	SECURE DISPOSAL	Term after departure from Academy	Public task

Promotional leaflets/ Newsletter	Assessment data	Current year + 1 year	SECURE DISPOSAL	Reviewed yearly	Performance of a task carried out in the public interest for the function of public funded education
Personal Mobile phones with work e-mails and Intern/parents contact numbers	Assessment data	Termination of employment then memory wipe	SECURE DISPOSAL	End of employment	Performance of a task carried out in the public interest for the function of public funded education
Barts Health Desktop Computer	Assessment data – access to local vacancies (intranet)	Online application period only	SECURE DISPOSAL	Application period completed	Performance of a task carried out in the public interest for the function of public funded education
Photos Display Board in Base	Assessment data	Termination of employment	SECURE DISPOSAL	End of employment	Performance of a task carried out in the public interest for the function of public funded education
Portfolios ASDAN/Induction folders Portfolios	Assessment data - portfolio	DOB + 25 years	SECURE DISPOSAL	Completion of portfolio	Performance of a task carried out in the public interest for the function of public funded education