

St Patrick's Catholic Primary School Records Retention Schedule

Introduction

This retention schedule describes the time periods for which records should be retained by the School in order to comply with operational and legal requirements, including data protection legislation. The retention periods given in this document are taken largely from the guidelines from the Information and Record Management Society. Please note that the default action to be taken at the end of the retention period is the secure destruction or deletion of the record. Exceptions to this are where the retention period is described as “permanent” (i.e. the record will never be destroyed), or where “refer to archives” is mandated.

All records created and held by the School, both in paper and electronic form, and including data held in databases are subject to retention policies. Where a record contains person identifying information, the retention periods stated in this schedule are mandatory requirements and must be followed unless a specific exception has been approved by the Education Data Protection Officer Service.

Unstructured information systems Email must not be used for storing School records, as all emails will be deleted after a specified period. Emails that constitute a record which needs to be retained, including those containing person identifying information, 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 School record should be managed in accordance with this schedule. However, where those records contain person identifying information the retention periods must be followed.

Structured systems storing person identifying information

All structured information management systems that store records containing person identifying information 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. Publications and promotional materials should be kept whilst current, and then one copy offered to the School archives for review.

| Record Types / Process Content | Functions / Activities | Retention Period | Retention Policy | Retention Period Starts | Lawful Basis for Processing Personal Data |
|---|---|---|--|----------------------------------|---|
| Pupil and parent / carer information | | | | | |
| SIMs data | School management information system | Date of leaving + 12 months | SECURE DISPOSAL | Term after departure from school | under performance of a task carried out in the public interest or in the exercise of official authority |
| Admissions information | School entry information | Retain whilst the child is at school then transfer to new school/LA upon leaving. | SECURE DISPOSAL | Term after departure from school | under performance of a task carried out in the public interest or in the exercise of official authority |
| Pupil record folders | Pupil files | Retain for the time which the pupil remains at the primary school | SECURE DISPOSAL | Term after departure from school | under performance of a task carried out in the public interest or in the exercise of official authority |
| SEND records | SEN files | DOB of the pupil + 25 years | SECURE DISPOSAL | Term after departure from school | under performance of a task carried out in the public interest or in the exercise of official authority |
| Safeguarding records | related guidance "Safeguarding Children in Education", September 2004 | Transferred to new school if kept in the pupil record folder. DOB of the pupil + 25 years if kept in a separate folder. | Transfer to the secondary school (or other | Term after departure from school | under performance of a task carried out in the public interest or in the exercise of official authority |
| Risk assessments | Methods to identify hazards and risk factors | Current year Life of risk assessment + 3 years | SECURE DISPOSAL | Term after departure from school | under performance of a task carried out in the public interest or in the exercise of official authority |
| Attendance Registers | Secondary transfer information Class attendance records | Date of register + 3 years | SECURE DISPOSAL | Term after departure from school | under performance of a task carried out in the public interest or in the exercise of official authority |
| Fire Registers | Club attendance records | Date of register + 3 years | SECURE DISPOSAL | Term after departure from school | under performance of a task carried out in the public interest or in the exercise of official authority |
| Medical Information | | | | | |

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|-------------------------------|--|---|-----------------|----------------------------------|--|
| Medical protocols | Medical methodology | Date of leaving + 12 months | SECURE DISPOSAL | End of school term | necessary for compliance with a legal obligation |
| Accident book / forms | Incident details for individual pupils and staff | DOB of child + 25 years or Date of incident + 6 years for Adults | SECURE DISPOSAL | Term after departure from school | necessary for compliance with a legal obligation |
| Injuries at work records | Methods to identify hazards and risk factors | Date of incident + 12 years | SECURE DISPOSAL | Term after departure from school | necessary for compliance with a legal obligation |
| Staff Information | | | | | |
| SIMS staff data | frequently accessed day-to-day staff records | Termination date + 6 years | SECURE DISPOSAL | Term after departure from school | performance of Contract |
| Staff personnel files | used for access and call function | Termination + 6 years | SECURE DISPOSAL | Term after departure from school | performance of Contract + Equalities Monitoring |
| Staff payroll files | frequently accessed day-to-day for information by the employer | Current year + 6 years | SECURE DISPOSAL | Term after departure from school | performance of Contract |
| Strictly Payroll Services | payroll information by the employer | Current year + 6 years | SECURE DISPOSAL | Term after departure from school | performance of Contract |
| HCSS | Records of staff incidents | Current year + 1 year | SECURE DISPOSAL | Term after departure from school | necessary for compliance with a legal obligation |
| Allegations against staff | Records of staff accidents | Normal retirement age or date of termination + 10 years, whichever is later | SECURE DISPOSAL | Term after departure from school | performance of Contract |
| Occupational Health referrals | employee health screenings records | Termination date + 6 years | SECURE DISPOSAL | Term after departure from school | performance of Contract |
| Services to Parents | | | | | |
| ParentPay | secure online payment system | Current year then review, if contact is no longer active then destroy | SECURE DISPOSAL | Term after departure from school | performance of Contract |

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| School Pupil Tracker Online | Online software used to update classes, attendance, upload CTF | Retain for the time which the pupil remains at the primary school | SECURE DISPOSAL | Term after departure from school | Performance of a task carried out in the public interest |
| Texting Service | SMS direct communication with parents | Current year then review, if contact is no longer active then destroy | SECURE DISPOSAL | Term after departure from school | Explicit consent |
| Services to Governors | | | | | |
| Governors services | Governor Information | Current Governor term then review, if contact is no longer active then destroy | SECURE DISPOSAL | | Performance of a task carried out in the public interest for the function of public funded education |
| Learning Resources | | | | | |
| School Pupil Tracker Online | Interactive literacy resource | Retain for the time which the pupil remains at the primary school | SECURE DISPOSAL | Term after departure from school | Performance of a task carried out in the public interest |
| Cached learning resources such as Espresso | Interactive literacy resource | Retain for the time which the pupil remains at the primary school | SECURE DISPOSAL | Term after departure from school | Performance of a task carried out in the public interest |
| Junior Librarian | web-based library management system Interactive literacy resource | Retain for the time which the pupil remains at the primary school | Archive till departure from school | Term after departure from school | Performance of a task carried out in the public interest |
| Miscellaneous | | | | | |
| Visitors logs/signing in sheets | Log of school visitors | Current year + 2 years | SECURE DISPOSAL | Term after departure from school | under performance of a task carried out in the public interest or in the exercise of official authority |