

Record Retention Schedule

Clarity Independent School

Bridge Barn Farm
Woodhill Road
Sandon
CM2 7SG

Clarity Independent School is committed to safeguarding...

"Our school is committed to our whole-school approach to safeguarding, which ensures that keeping children safe is at the heart of everything we do, and underpins all systems, processes and policies...We promote an environment where children and young people feel empowered to raise concerns and report incidents and we work hard in partnership with pupils, parents and care-givers to keep children safe."

Clarity Safeguarding Policy September 2026

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Business Manager and DPO

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The Retention Schedule is divided into 4 sections.

- 1 School Management
 - 1.1 Head Teacher and Senior Management Team
 - 1.2 Operational Administration
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 - 1.4 Health and Safety
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- 2 Pupil Management
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4. ISA/Central Government and Local Authority
 - 4.1 Local Authority
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Retention periods are defined in accordance with UK GDPR principles, including data minimisation and storage limitation. Records will not be retained longer than necessary unless legal or safeguarding obligations apply.

1. Management of the School

This section contains retention periods connected to the processes involved in managing the school, including Human Resources, Financial Management, Payroll and Property Management.

1.1 Head Teacher and Senior Management Team					
	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
1.1.1	Log books of activity in the school maintained by the Head Teacher		Date of last entry in the book + minimum of 6 years, then review	These could be of Permanent historical value and should be offered to the County Archives Service if appropriate	Potential
1.1.2	Minutes of Senior Management Team meetings and the meetings of other internal administrative bodies		Date of the meeting + 5 years then review annually, or as required if not destroyed	SECURE DISPOSAL	Potential
1.1.3	Reports created by the Head Teacher or the Management Team		Date of the report + a minimum of 3 years then review annually or as required if not destroyed	SECURE DISPOSAL	Potential

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
1.1.4	Records created by head teachers, deputy head teachers, heads of year and other members of staff with administrative responsibilities which do not fall under any other category		Current academic year + 6 years then review annually, or as required if not destroyed	SECURE DISPOSAL	Potential
1.1.5	Correspondence created by head teachers, deputy head teachers, heads of year and other members of staff with administrative responsibilities		Current year + 3 years	SECURE DISPOSAL	Potential
1.1.6	Professional development plans		These should be held on the individual's personnel record. If not then termination of employment + 6 years	SECURE DISPOSAL	Potential
1.1.7	School development plans		Life of the plan + 6 years	SECURE DISPOSAL	

1.2 Operational Administration					
	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
1.2.1	General file series which do not fit under any other category		Current year + 5 years, then review	SECURE DISPOSAL	Potential
1.2.2	Records relating to the creation and publication of the school brochure or prospectus		Current academic year + 3 years	The school could preserve a copy for their archive otherwise STANDARD DISPOSAL	
1.2.3	Records relating to the creation and distribution of circulars to staff, parents or pupils		Current academic year + 1 year	STANDARD DISPOSAL	
1.2.4	School Privacy Notice which is sent to parents as part of GDPR compliance		Until superseded + 6 years		
1.2.5	Consents relating to school activities as part of GDPR compliance (for example, consent to be sent circulars or mailings)		Consent will last whilst the pupil attends the school, it can therefore be destroyed when the pupil leaves	SECURE DISPOSAL	Yes
1.2.6	Newsletters and other items with a short operational use		Current academic year + 1 year [Schools may decide to archive one copy]	STANDARD DISPOSAL	
1.2.7	Visitor management systems (including electronic systems, visitors books and signing-in sheets)		Last entry in the visitors book + 3 years (in case of claims by parents or pupils about various actions).	SECURE DISPOSAL	Yes

1.3 Human Resources					
	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information of
Recruitment					
1.3.1	All records leading up to the appointment of a headteacher		Unsuccessful attempts. Date of appointment plus 6 months. Add to personnel file and retain until end of appointment + 6 years, except in cases of negligence or claims of child abuse then at least 15 years	SECURE DISPOSAL	Yes
1.3.2	All records leading up to the appointment of a member of staff/ –unsuccessful candidates		Date of appointment of successful candidate + 6 months	SECURE DISPOSAL	Yes
1.3.3	Pre-employment vetting information – DBS Checks – successful candidates	DBS Update Service Employer Guide January 2026; Keeping Children Safe in Education current year (Statutory Guidance from DoE) Sections 73, 74	Application forms, references and other documents – for the duration of the employee's employment + 6 years	SECURE DISPOSAL	Yes

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
Recruitment					
1.3.4	Forms of proof of identity collected as part of the process of checking "portable" enhanced DBS disclosure		Where possible this process should be carried out using the on-line system. If it is necessary to take a copy of documentation then it should be retained on the staff personal file.	SECURE DISPOSAL	Yes
1.3.5	Pre-employment vetting information – Evidence proving the right to work in the United Kingdom – successful candidates	An Employer's Guide to Right to Work Checks June 2025	Where possible 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 + not less than 2 years	SECURE DISPOSAL	Yes
Operational Staff Management					
1.3.6	Staff personnel file	Limitation Act 1980 (Section 2)	Termination of Employment + 6 years, unless the member of staff is part of any case which falls under the terms of reference of IICSA. If this is the case then the file will need to be retained until IICSA enquiries are complete	SECURE DISPOSAL	Yes
1.3.7	Annual appraisal /assessment records		Current year + 3 years	SECURE DISPOSAL	Yes

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
Operational Staff Management					
1.3.8	Sickness absence monitoring		Sickness records are categorised as sensitive data. There is a legal obligation under statutory sickness pay to keep records for sickness monitoring. Sickness records should be kept separate from accident records. It could be argued that where sickness pay is not paid then current year + 3 years is acceptable, whilst if sickness pay is made then it becomes a financial record and current year + 6 years applies. The actual retention may depend on the internal auditors. Most seem to accept current year + 3 years as being acceptable as this gives them, 'benefits' and Inland Revenue have time to investigate if they need to	SECURE DISPOSAL	Yes
1.3.9	Staff training – where the training leads to continuing professional development		Length of time required by the professional body	SECURE DISPOSAL	Yes
1.3.10	Staff training – except where dealing with children, e.g. first aid or health and safety		This should be retained on the personnel file	SECURE DISPOSAL	Yes

	Basic file descript	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
Operational Staff Management					
1.3.11	Staff training – where the training relates to children (e.g. safeguarding or other child related training)		Date of the training + 40 years This retention period will be reviewed when the government and ICO have published guidance about the implementation of the recommendations made by IICSA.	SECURE DISPOSAL	Yes
Disciplinary and Grievance Processes					
Where schools are in any doubt as to which categories disciplinary records fall under, then HR or legal advice should be sought from the Local Authority.					
1.3.12	Records relating to any allegation of a child protection nature against a member of staff	Keeping children safe in education Statutory guidance for schools and colleges (September of current year); Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children. If in doubt about recording requirements, staff should discuss with the designated safeguarding lead deputy)	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 UNLESS the member of staff is part of any case which falls under the terms of reference of IICSA. If this is the case then the file will need to be retained until IICSA enquiries are complete	SECURE DISPOSAL These records must be shredded	Yes
1.3.13	Disciplinary proceedings	As per policy	Employment + 6 years	SECURE DISPOSAL These records must be shredded	Yes

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
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Disciplinary and Grievance Processes

Note:

Where the warning relates to child protection issues, see above. If the disciplinary proceedings relate to a child protection matter, please contact your Safeguarding Children Officer for further advice. Relevant to all disciplinary cases. The [ACAS code of practice on disciplinary and grievance procedures](#) recommends that the employee should be told how long a disciplinary warning will remain current. However, this does not mean that the data itself should be destroyed at the end of the set period. Any disciplinary proceedings data will be a record of an important event in the course of the employer's relationship with the employee. Should the same employee be accused of similar misconduct five years down the line and defend him- or herself by saying "I would never do something like that", reference to the earlier proceedings may show that the comment should not be given credence. Alternatively, if the employee were to be dismissed for some later offence and then claim at tribunal that he or she had "fifteen years of unblemished service", the record of the disciplinary proceedings would be effective evidence to counter this claim. Employers should, therefore, be careful not to confuse the expiry of a warning for disciplinary purposes with a requirement to destroy all reference to its existence in the personnel file. One danger is that the disciplinary procedure itself often gives the impression that, at the end of the effective period for the warning, the warning will be "removed from the file". This or similar wording should be changed to make it clear that, while the warning will not remain active in relation to future disciplinary matters, a record of what has occurred will be kept.

	Oral warning		Date of warning + 6 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 + 6 months		
	Written warning – level 2		Date of warning + 12 months		
	Final warning		Date of warning + 18 months		
	Case not found		If the incident is related to child protection then see 1.3.12 above, otherwise dispose of at the conclusion of the case	SECURE DISPOSAL	

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
Payroll and Pensions					
1.3.14	Absence record		Current year + 3 years	SECURE DISPOSAL	Yes
1.3.15	Batches	Taxes Management Act 1970 Income and Corporation Taxes 1988	Current year + 6 years	SECURE DISPOSAL	Yes
1.3.16	Bonus sheets	Taxes Management Act 1970 Income and Corporation Taxes 1988	Current year + 3 years	SECURE DISPOSAL	Yes
1.3.17	Car allowance claims	Taxes Management Act 1970 Income and Corporation Taxes 1988	Current year + 3 years	SECURE DISPOSAL	Yes
1.3.18	Car loans	Taxes Management Act 1970 Income and Corporation Taxes 1988	Completion of loan + 6 years	SECURE DISPOSAL	Yes
1.3.19	Car mileage output	Taxes Management Act 1970 Income and Corporation Taxes 1988	Current year + 6 years	SECURE DISPOSAL	Yes
1.3.20	Elements		Current year + 2 years	SECURE DISPOSAL	Yes
1.3.21	Income tax form P60		Current year + 6 years	SECURE DISPOSAL	Yes

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
Payroll and Pensions					
1.3.22	Insurance	Taxes Management Act 1970 Income and Corporation Taxes 1988	Current year + 6 years	SECURE DISPOSAL	Yes
1.3.23	Maternity payment		Current year + 3 years	SECURE DISPOSAL	Yes
1.3.24	Members allowance register	Taxes Management Act 1970 Income and Corporation Taxes 1988	Current year + 6 years	SECURE DISPOSAL	Yes
1.3.25	National Insurance – schedule of payments	Taxes Management Act 1970 Income and Corporation Taxes 1988	Current year + 6 years	SECURE DISPOSAL	Yes
1.3.26	Overtime	Taxes Management Act 1970 Income and Corporation Taxes 1988	Current year + 3 years	SECURE DISPOSAL	Yes
1.3.27	Part time fee claims	Taxes Management Act 1970 Income and Corporation Taxes 1988	Current year + 6 years	SECURE DISPOSAL	Yes
1.3.28	Payroll awards		Current year + 6 years	SECURE DISPOSAL	Yes

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
Payroll and Pensions					
1.3.30	Payroll – gross/net weekly or monthly	Taxes Management Act 1970 Income and Corporation Taxes 1988	Current year + 6 years	SECURE DISPOSAL	Yes
1.3.31	Payroll reports	Taxes Management Act 1970 Income and Corporation Taxes 1988	Current year + 6 years	SECURE DISPOSAL	Yes
1.3.32	Pay slips – copies	Taxes Management Act 1970 Income and Corporation Taxes 1988	Current year + 6 years	SECURE DISPOSAL	Yes
1.3.33	Pension payroll	Taxes Management Act 1970 Income and Corporation Taxes 1988	Current year + 6 years	SECURE DISPOSAL	Yes
1.3.34	Personal bank details	If employment ceases then end of employment + 6 years	Until superseded + 3 years	SECURE DISPOSAL	Yes
1.3.35	Sickness records		Current year + 3 years	SECURE DISPOSAL	Yes
1.3.36	Staff returns		Current year + 3 years	SECURE DISPOSAL	Yes
1.3.37	Superannuation adjustments	Taxes Management Act 1970 Income and Corporation Taxes 1988	Current year + 6 years	SECURE DISPOSAL	Yes

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
Payroll and Pensions					
	Superannuation reports	Taxes Management Act 1970 Income and Corporation Taxes 1988	Current year + 6 years	SECURE DISPOSAL	Yes
1.3.38	Tax forms P6/P11/P11D/P35/P45/P46/P48	The minimum requirement - as stated in Inland Revenue Booklet 490 - is for at least 3 years after the end of the tax year to which they apply. Originals must be retained in paper/electronic format. It is a corporate decision to retain for current year + 6 years. Employees should retain records for 22 months after current tax year	Current year + 6 years	SECURE DISPOSAL	Yes
1.3.39	Time sheets/clock cards/flexitime		Current year + 3 years	SECURE DISPOSAL	Yes

1.4 Health and Safety					
	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
1.4.1	Health and safety policy statements		Life of policy + 3 years	SECURE DISPOSAL	
1.4.2	Health and safety risk assessments		Life of risk assessment + 3 years provided that a copy of the risk assessment is stored with the accident report if an incident has occurred	SECURE DISPOSAL	
1.4.3	Accident reporting records relating to individuals who are over 18 years of age at the time of the incident	Social Security (Claims and Payments) Regulations 1979 Regulation 25. Social Security Administration Act 1992 Section 8. Limitation Act 1980	Date of last entry in the accident book + 3 years but if there is possibility of negligence allegation then date of incident + 15 years or date of settlement + 6 years Do not keep completed entries in the book. They must be removed and kept in a locked location.	SECURE DISPOSAL	Yes

1.4 Health and Safety					
	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
1.4.4	Accident reporting records relating to individuals who are under 18 years of age at the time of the incident	Social Security (Claims and Payments) Regulations 1979 Regulation 25. Social Security Administration Act 1992 Section 8. Limitation Act 1980	The Accident Book – BI510 - 3 years after last entry in the book The official Accident Book must be retained for 3 years after the last entry in the book. The book may be in paper or electronic format The incident reporting form may be retained as below [see also the incident reporting form]	SECURE DISPOSAL	Yes
1.4.5	Records relating to any reportable death, injury, disease or dangerous occurrence (RIDDOR). For more information see http://www.hse.gov.uk/RIDDOR/	Reporting of Injuries, Diseases and Dangerous Occurrences Regulations 2013 SI 2013 No 1471 Regulation 12(2)	Date of incident + 3 years provided that all records relating to the incident are held on personnel file [see 1.4.2 above]	SECURE DISPOSAL	Yes

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
1.4.6	Control of Substances Hazardous to Health (COSHH)	Control of Substances Hazardous to Health Regulations 2002 (as amended). 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)	COSHH sheets should be kept whilst the substance is in use + 6 years COSHH policy documents should be kept until the policy is superseded + 6 years	SECURE DISPOSAL	
1.4.7	Process of monitoring of areas where employees and persons are likely to have come into contact with asbestos	Control of Asbestos at Work Regulations 2012 SI 1012 No 632 Regulation 19	Last action + 40 years	SECURE DISPOSAL	
1.4.8	Process of monitoring of areas where employees and persons are likely to have come into contact with radiation. Dose assessment and recording	The Ionising Radiation Regulations 2017.	2 years from the date on which the examination was made and that the record includes the condition of the equipment at the time of the examination. To keep the records made and maintained or a copy of these records until the person to whom the record relates has or would have attained the age of 75 years but in any event for at least 30 years from when the record was made	SECURE DISPOSAL	
1.4.9	Fire Precautions log books		Life of log book + 3 years	SECURE DISPOSAL	

1.4 Health and Safety					
	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
1.4.10	Health and safety file to show current state of building, including all alterations (wiring, plumbing, building works, etc.), to be passed on in the case of change of ownership		Pass to new owner on sale or transfer of building		
1.5 Financial Management					
	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
Risk Management and Insurance					
1.5.1	Employer's Liability Insurance Certificate		Year of issue + 40 years. Pass to the Local Authority if the school closes	SECURE DISPOSAL To be passed to the Local Authority if the school closes	
Asset Management					
1.5.2	Inventories of furniture and equipment Burglary, theft & Vandalism report forms		Current year + 6 years	SECURE DISPOSAL	
1.5.3	Records relating to the settlement of insurance claims		Date the policy expires + 6 years except Public Liability insurance - day of issue + 40 years	SECURE DISPOSAL	
Accounts and Statements (including budget management)					
1.5.4	Annual accounts		Current year + 6 years	STANDARD DISPOSAL	
1.5.5	Loans and grants managed by the school		Date of last payment on the loan + 12 years then review	SECURE DISPOSAL	

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
Accounts and Statements (including budget management)					
1.5.6	All records relating to the creation and management of budgets, including the annual budget statement and back-ground papers		Life of the budget + 3 years	SECURE DISPOSAL	
1.5.7	Invoices, receipts, order books and requisitions, delivery notices		Current financial year + 6 years	SECURE DISPOSAL	
1.5.8	Records relating to the collection and banking of monies		Current financial year + 6 years	SECURE DISPOSAL	
1.5.9	Records relating to the identification and collection of debt		Final payment of debt + 6 years	SECURE DISPOSAL	
Pupil Finance					
1.5.10	Student Grant applications		Current year + 3 years	SECURE DISPOSAL	Yes
1.5.11	Pupil Premium Fund records		Date pupil leaves the provision + 6 years	SECURE DISPOSAL	Yes
Contract Management					
1.5.12	All records relating to the management of contracts under seal	Limitation Act 1980	Last payment on the contract + 12 years or end of contract + 12 years, whichever is the longer	SECURE DISPOSAL	No
1.5.13	All records relating to the management of contracts under signature	Limitation Act 1980	Last payment on the contract + 6 years or end of contract + 6 years whichever is the longer	SECURE DISPOSAL	No
1.5.14	Records relating to the monitoring of contracts		End of contract or until the final payment has been made, whichever is the longer	SECURE DISPOSAL	No

School Meals Management					
1.5.22	Free school meals registers (where the register is used as a basis for funding)		Current year + 3 years	SECURE DISPOSAL	Yes
1.5.23	School meals registers		Current year + 3 years	SECURE DISPOSAL	Yes
1.5.24	School meals summary sheets		Current year + 6 years	SECURE DISPOSAL	Yes

1.6 Property Management					
	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
Property Management					
1.6.1	Title deeds of properties belonging to the school		These should follow the property unless the property has been registered with the Land Registry		
1.6.2	Plans of property belonging to the school		These should be retained whilst the building belongs to the school and should be passed on to any new owners if the building is leased or sold.		
1.6.3	Leases of property leased by or to the school		Expiry of lease + 6 years	SECURE DISPOSAL	
1.6.4	Records relating to the letting of school premises		Current financial year + 6 years	SECURE DISPOSAL	
Maintenance					
1.6.5	All records relating to the maintenance of the school carried out by contractors		These should be retained whilst the building belongs to the school and should be passed on to any new owners if the building is leased or sold.	SECURE DISPOSAL	
1.6.6	All records relating to the maintenance of the school carried out by school employees, including maintenance log books		These should be retained whilst the building belongs to the school and should be passed on to any new owners if the building is leased or sold.	SECURE DISPOSAL	

2. Pupil Management

This section contains retention periods connected to the processes involved in managing a pupil's journey through school, including the admissions process.

2.1 Admissions Process					
	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
2.1.1	All records relating to the creation and implementation of the School Admissions Policy	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels	Life of the policy + 7 years. 15(2) of the regulation refers to the 7 preceding years	SECURE DISPOSAL	
2.1.2	Admissions – if the admission is successful	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels	Date of admission + 1 year	SECURE DISPOSAL	Yes
2.1.3	Admissions – if the appeal is unsuccessful	School Admissions Code Statutory guidance for admission authorities, local authorities, schools adjudicators and admission appeals panels.	Resolution of case + 1 year	SECURE DISPOSAL	Yes
2.1.4	Register of Admissions	School attendance: Departmental advice for maintained schools, Academies, independent schools and local authorities. School Attendance (Pupil Registration) (England) Regulations 2025.	Every entry in the attendance register must be preserved for a period of 6 years after the date on which the entry was made. Every back up copy of the register is to be preserved for 6 years after the end of the school year to which it relates.	REVIEW Consider keeping the admission register permanently, as often schools receive enquiries from past pupils to confirm the dates they attended the school	Yes

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
2.1.5	Admissions – Secondary Schools – Casual		Current year + 1 year	SECURE DISPOSAL	Yes
2.1.6	Proofs of address supplied by parents as part of the admissions process	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels.	Current year + 1 year	SECURE DISPOSAL	Yes
2.1.7	Supplementary information form including additional information such as religion, medical conditions etc.		Information to be added to pupil file		Yes
2.1.7.1	For successful admissions		This information should be added to the pupil file	SECURE DISPOSAL	
2.1.7.2	For unsuccessful admissions		Until appeals process completed (GDPR)	SECURE DISPOSAL	

2.2 Pupil's Educational Record

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
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Please note that any record containing pupil information may be subject to the requirements of the IICSA. Schools should implement any instruction which has been received from IICSA. The instructions from IICSA will override any guidance given in this Retention Schedule. If any school is unsure about what records should be retained, they should seek the advice of their own local authority or take independent legal advice.

2.2.1	Pupil's Educational Record required by The Education (Pupil Information) (England) Regulations 2005	The Education (Pupil Information) (England) Regulations 2005 SI 2005 No. 1437	Retain whilst the child remains at the school	The file should follow the pupil when they leave the school. If the pupil dies whilst at primary school, the file should be returned to the LA to be retained for the statutory retention period	Yes
2.2.1.1	Primary	The Education (Pupil Information) (England) Regulations 2005 SI 2005 No. 1437	Retain whilst the child remains at the primary school	The file should follow the pupil when he/she leaves the primary school. This will include: • To another primary school • To a secondary school • To a pupil referral unit	
2.2.1.2	Secondary	Limitation Act 1980 (Section 2)	Date of birth of the pupil + 25 years	Secure Disposal	Yes
2.2.2	Examination Results – pupil copies		Keep on pupil file- already covered by main retention		Yes
2.2.2.1	Public		This information should be added to the pupil file	All uncollected certificates should be returned to the examination board after reasonable attempts to contact the pupil have failed	
2.2.2.2	Internal		This information should be added to the pupil file		

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
2.2.3	Child protection information held on pupil file	Keeping children safe in education Statutory guidance for schools and colleges (September 2026); Working together to safeguard children (2026). 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. (Date of birth + 25 years) Note: These records will be subject to any instruction given by IICSA	SECURE DISPOSAL These records must be shredded	Yes
2.2.4	Child protection information held in separate files	Keeping children safe in education Statutory guidance for schools and colleges (September 2026); Working together to safeguard children (2026). A guide to inter-agency working to safeguard and promote the welfare of children 2018	Date of years then review birth + 25 This retention period will be reviewed when the government and ICO have published guidance about the implementation of the recommendations made by IICSA.	SECURE DISPOSAL These records must be shredded	Yes

2.3 Attendance

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
2.3.1	Attendance Registers	School attendance Guidance for maintained schools, academies, independent schools and local authorities [updated and re-published annually] School Attendance (Pupil Registration) (England) Regulations 2025	Every entry in the attendance register must be preserved for a period of 6 years after the date on which the entry was made. Every back up copy of the register is to be preserved for 6 years after the end of the school year to which it relates.	SECURE DISPOSAL	Yes
2.3.2	Correspondence relating to any absence (authorised or unauthorised)	Education Act 1996 Section 7	Current academic year + 2 years	SECURE DISPOSAL	Potential

5. 2.4 Special Education Needs and Disabilities

2.4	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
5.1 2.4.1	Special Educational Needs files, reviews and Individual Education Plans	Limitation Act 1980	Date of birth of the pupil + 25 years	SECURE DISPOSAL	Yes
5.2 2.4.2	Statement maintained under section 234 of the Education Act 1990 and any amend	Education Act 1996 Special Educational Needs and Disability Act 2001 Section 1	Date of birth of the pupil + 25 years [This would normally be retained on the pupil file] unless the document is subject to a legal hold then 6 years after legal action ended	SECURE DISPOSAL	Yes
5.3 2.4.3	Advice and information provided to parents regarding educational needs	Special Educational Needs and Disability Act 2001 Section 2	Date of birth of the pupil + 25 years [This would normally be retained on the pupil file] unless the document is subject to a legal hold then date legal action ceases + 6 years	SECURE DISPOSAL	Yes
5.4 2.4.4	Accessibility strategy	Special Educational Needs and Disability Act 2001 Section 14	Date of birth of the pupil + 25 years [This would normally be retained on the pupil file] unless the document is subject to a legal hold then date legal action ceases + 6 years	SECURE DISPOSAL	Yes

3 Curriculum and Extra Curricular Activities

This section contains retention periods connected to the processes involved in managing the curriculum and extra-curricular activities.

3.1 Statistics and Management Information					
	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
3.1.1	Curriculum returns		Current year + 3 years	SECURE DISPOSAL	No
3.1.2	Examination Results (school's copy)		Current year + 6 years	SECURE DISPOSAL	Yes
3.1.2.1	SATS records		The examination papers should be kept until any appeals/validation process is complete	SECURE DISPOSAL	Yes
3.1.2.2	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 of the whole year's SATS results. These could be kept for current year + 6 years to allow suitable comparison	SECURE DISPOSAL	Yes
3.1.2.3	Examination Papers		The examination papers should be kept until any appeals/validation process is complete	SECURE DISPOSAL	Yes
3.1.3	Published Admission Number (PAN) Reports		Current year + 6 years	SECURE DISPOSAL	Yes

3.1 Statistics and Management Information

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
3.1.4	Value Added and Contextual Data		Current year + 6 years	SECURE DISPOSAL	Yes
3.1.5	Self-Evaluation Forms		Current year + 6 years	SECURE DISPOSAL	Yes
3.1.5.1	Internal moderation		Academic year plus one academic year	SECURE DISPOSAL	Yes
3.1.5.2	External moderation		Until superseded	SECURE DISPOSAL	Yes

3.2 Implementation of Curriculum

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
3.2.1	Schemes of work		Current year + 1 year	It may be appropriate to review these records at the end of each year and allocate a further retention period or SECURE DISPOSAL	No
3.2.2	Timetable		Current year + 1 year		No
3.2.3	Class record books		Current year + 1 year		No
3.2.4	Mark books		Current year + 1 year		No
3.2.5	Record of home-work set		Current year + 1 year		No
3.2.6	Pupil's work		Where possible, the pupil's 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	Yes

3.3 School Trips

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
3.3.1	Parental consent forms for school trips where there has been no major incident		Conclusion of the trip. Although the consent forms could be retained for date of birth + 25 years, the requirement for them being needed is low and most schools do not have the storage capacity to retain every single consent form issued by the school for this period of time	SECURE DISPOSAL	Yes
3.3.2	Parental permission slips for school trips – where there has been a major incident	Limitation Act 1980 (Section 2)	Date of birth of the pupil involved in the incident + 25 years or 15 years after the incident whichever is the longer. 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	SECURE DISPOSAL	Yes

For information relating to records concerning the running of educational visits outside the classroom please see the guidance provided by <https://oeapng.info/>

4. ISA/Central Government and Local Authority

This section covers records created in the course of interaction between the school, the ISA, Central Government and local authority

4.1 Local Authority					
	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
4.1.1	Secondary Transfer Sheets (primary)		Current year + 2 years	SECURE DISPOSAL	Yes
4.1.2	Attendance returns		Current year + 1 year	SECURE DISPOSAL	Yes
4.1.3	Circulars and other information sent from the local authority		Operational use	SECURE DISPOSAL	No

	Basic file description	Statutory Provisions	Retention Period [Operational]	Action at end of the administrative life of the record	Personal Information
4.2.1	OFSTED reports and papers where a physical copy is held		Life of the report then review	SECURE DISPOSAL	
4.2.2	Returns made to the DfE and ISA including census		Current year + 5 years	SECURE DISPOSAL	
4.2.3	Circulars and other information sent from central Government/ISA		Operational use	SECURE DISPOSAL	