Oxfordshire Hospital School

Information Management Retention Periods (*Excluding Financial Management; Property Management*)

November 2023

https://irms.org.uk/page/SchoolsToolkit

Governing Body			
Basic File Description	Retention Period: OHS	Disposal Process: OHS	Important Considerations (OHS)
Instrument of Government	For the life of the school	n/a	
Agenda and Minutes of Governing Body Meetings (Clerked set - signed)	Permanent	n/a	Cloud based storage – Governor Hub
Reports presented to the Governing Body	10 years from the date of the meeting	n/a	Cloud based storage – Governor Hub
Governor meeting attendance records	Date of meeting + 6 years	SECURE DISPOSAL	
Records relating to complaints dealt with by Governing Body	• Major, current year + 6 • If negligence, current year + 15 • If cp or safeguarding, current year + 40	SECURE DISPOSAL	Cloud based storage - Governor Hub
Records relating to the appointment of parent & staff governors	Date of election + 6 months	SECURE DISPOSAL	
Records relating to the appointment of co-opted governors	Notes recorded in governor meeting minutes - retain for the life of the school	n/a	
Records relating to the election of the chair & vice chair	Notes recorded in governor meeting minutes - retain for the life of the school	n/a	
Records relating to governor visits	Date of visit + 3 years	SECURE DISPOSAL	
Policies	Until superseded	SECURE DISPOSAL	
Records relating to the appointment of a clerk	Date of cessation of clerk + 6 years	SECURE DISPOSAL	

Governing Body			
Basic File Description	Retention Period: OHS	Disposal Process: OHS	Important Considerations (OHS)
Records relating to: ● Appointment of governors ● Terms of office ● Declaration of interest against disqualification ● Register of business interests ● Training required & received ● Induction ● Personnel files	Date of cessation of governor role + 6 years	SECURE DISPOSAL	

School Senior Leadership Team			
Basic File Description	Retention Period: OHS	Disposal Process: OHS	Important Considerations (OHS)
School Development Plans	Life of plan + 3 years	SECURE DISPOSAL	Cloud based storage system
SEF	Current year + 6 years	SECURE DISPOSAL	
SLT Minutes / other staff meetings	Date of meeting + 3 years then review	SECURE DISPOSAL	Cloud based storage system
Reports created by school leaders	Date of the report + 3 years	SECURE DISPOSAL	
Records created by school leaders	Date of the record + 6 years	SECURE DISPOSAL	
Correspondence created by school leaders	Date of the correspondence + 3 years	SECURE DISPOSAL	

Operational Administration			
Basic File Description	Retention Period: OHS	Disposal Process: OHS	Important Considerations (OHS)
School brochures	Current + 3 years	STANDARD DISPOSAL	
Circulars/newsletters for staff, students, parents	Current + 1 year then review	SECURE DISPOSAL	
Visitors signing-in books	Current + 6 years then Review	SECURE DISPOSAL	
School privacy notice sent to parents as part of GDPR compliance	UNtil superseded + 6 years	SECURE DISPOSAL	

Human Resources - Recruitment			
Basic File Description	Retention Period: OHS	Disposal Process: OHS	Important Considerations (OHS)
All records related to recruitment of Head Teacher	Unsuccessful - date of appointment + 6 months Successful - date of appointment + 6 years If claims of negligence or safeguarding at least + 15 years	SECURE DISPOSAL	
All records leading up to the appointment of a new member of staff or governor if unsuccessful	Date of Appointment of successful candidate + 6 months	SECURE DISPOSAL	
Pre-employment vetting information - DBS checks	For the duration of employment + 6 years	SECURE DISPOSAL	
Pre-employment vetting information - right to work	For the duration of employment + at least 2 years	SECURE DISPOSAL	

Human Resources - Operational Staff Management			
Basic File Description	Retention Period: OHS	Disposal Process: OHS	Important Considerations (OHS)
Staff Personal Files	Termination of Employment + 6 years	SECURE DISPOSAL	
Annual appraisal / assessment records	Current year + 6 years	SECURE DISPOSAL	
Sickness monitoring	● Sickness not paid, current year + 3 ● Sickness paid, current year + 6	SECURE DISPOSAL	
Staff training not related to safeguarding	As required by the school For the duration of employment	SECURE DISPOSAL	
Staff training related to safeguarding	Date of training + 40 years	SECURE DISPOSAL	

Human Resources - Disciplinary & Grievance Procedures			
Basic File Description	Retention Period: OHS	Disposal Process: OHS	Important Considerations (OHS)
Allegation of CP nature against a member of staff	Until the person's NRA or 10 years from the date of allegation (then review)	SECURE DISPOSAL	Allegations found to be malicious should be removed from p files.
Oral Warning	Date of warning + 6 months	SECURE DISPOSAL	If warnings are placed on file they must be weeded following the retention period.
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 safeguarding see above Otherwise, dispose of at conclusion of case		

Human Resources - Payroll & Pensions			
Basic File Description	Retention Period: OHS	Disposal Process: OHS	Important Considerations (OHS)
Absence	Current + 3 years	SECURE DISPOSAL	
Car mileage claims	Current + 6 years	SECURE DISPOSAL	
Income tax from p60	Current + 6 years	SECURE DISPOSAL	
Insurance	Current + 6 years	SECURE DISPOSAL	
Maternity payment	Current + 6 years	SECURE DISPOSAL	
National INsurance Schedule of Payments	Current + 6 years	SECURE DISPOSAL	
Overtime payments & time sheets	Current + 3 years	SECURE DISPOSAL	
Payroll awards	Current + 6 years	SECURE DISPOSAL	
Payroll including patsips and pensions	Current + 6 years	SECURE DISPOSAL	

Health & Safety			
Basic File Description	Retention Period: OHS	Disposal Process: OHS	Important Considerations (OHS)
Health & Safety Policy	Life of policy + 3 years	SECURE DISPOSAL	
Risk Assessments	Life of RA + 3 years	SECURE DISPOSAL	
Accident reports for 18+	3 years from date of last entry in the book	SECURE DISPOSAL	
Accident reports for under 18	3 years from date of last entry in the book	SECURE DISPOSAL	
RIDDOR reportable records	Date of incident + 3 years	SECURE DISPOSAL	

Health & Safety			
Basic File Description	Retention Period: OHS	Disposal Process: OHS	Important Considerations (OHS)
Control of substances hazardous to health (COSHH)	Date of incident + 40 years	SECURE DISPOSAL	
Asbestos contact records	Last action + 40 years	SECURE DISPOSAL	
Radiation contact records	Until employee has attained the age of 75+ years	SECURE DISPOSAL	
Fire precautions log book	Current + 3 years	SECURE DISPOSAL	

Finance			
Basic File Description	Retention Period: OHS	Disposal Process: OHS	Important Considerations (OHS)
Employers liability insurance certificate	Closure of the school +40 years	SECURE DISPOSAL to be passed to the Local Authority if the school closes	
Inventories of furniture & equipment	Current + 6 years	SECURE DISPOSAL	
Burglary theft and vandalism report	Current + 6 years	SECURE DISPOSAL	
Annual accounts	Current + 6 years	SECURE DISPOSAL	
Budget statements & background papers	Life of the budget +3 years	SECURE DISPOSAL	
Invoices, receipts order book requisitions	Current financial year + 6 years	SECURE DISPOSAL	
Records relating to the collection of monies and banking receipts	Current financial year + 6 years	SECURE DISPOSAL	
Records relating to the identification and collection of debt	Current financial year + 6 years	SECURE DISPOSAL	
Records relating to the management of contracts	Last payment on cataract + 12 years	SECURE DISPOSAL	
School fund ● Cheque book ● Paying in book ● Ledger ● Invoices ● Receipts ● Bank Statements		SECURE DISPOSAL	

Pupil Records - Admissions / Referrals				
Basic File Description	Retention Period: Enrolled School	Retention Period: OHS	Disposal Process: OHS	Important Considerations (OHS)
Admissions policy and records relating to its creation	n/a	Life of policy + 3 years	SECURE DISPOSAL	
Register of admissions and attendance data (including referral requests for OTS)	As per school attendance code (3 years after entry dates)	Transfer of pupil records & the responsibility of the enrolled / receiving school. The OHS will off-roll students at the point of discharge and delete records from the OHS MIS as per the retention period at the end of each academic year	SECURE DISPOSAL	A review of data stored will take place prior to annual deletion to ensure that 'enrolled schools' receive an encrypted records held by the OHS. A receipt of records sent to enrolled schools will be saved on the secure OHS external hard drive.
Unsuccessful referrals	n/a	Date of resolution of case + 1 year	SECURE DISPOSAL	

Pupil Records - Educational Records				
Basic File Description	Retention Period: Enrolled School	Retention Period: OHS	Disposal Process: OHS	Important Considerations (OHS)
Pupil's Educational Record	Date of Birth + 25 years (secondary)	Off-roll on OHS MIS at point of discharge. Annual deletion from OHS MIS at the end of each academic year. For EHE pupils, all information is shared directly to the EHE caseworker and to EHE@oxfordshire.gov.uk for upload to their data system. Keep records for 2 years following the academic year of discharge from OHS	SECURE DISPOSAL	A review of data stored will take place prior to annual deletion to ensure that 'enrolled schools' receive encrypted records held by the OHS. A receipt of records sent to enrolled schools will be saved on the secure OHS external hard drive.
Child Protection Records	Date of Birth + 25 years (secondary)	Off-roll on OHS MIS at point of discharge. Annual deletion from OHS MIS at the end of each academic year	SECURE DISPOSAL	A review of data stored will take place prior to annual deletion to ensure that 'enrolled schools' receive

Pupil Records - Educational Records				
Basic File Description	Retention Period: Enrolled School	Retention Period: OHS	Disposal Process: OHS	Important Considerations (OHS)
		For EHE pupils, all information is shared directly to the EHE caseworker and to EHE@oxfordshire.gov.uk for upload to their data system.		encrypted records held by the OHS. A receipt of records sent to enrolled schools will be saved on the secure OHS external hard drive.
SEND Files	Date of Birth + 31 years	Off-roll on OHS MIS at point of discharge. Annual deletion from OHS MIS at the end of each academic year For EHE pupils, all information is shared directly to the EHE caseworker and to EHE@oxfordshire.gov.uk for upload to their data system.	SECURE DISPOSAL	A review of data stored will take place prior to annual deletion to ensure that 'enrolled schools' receive encrypted records held by the OHS. A receipt of records sent to enrolled schools will be saved on the secure OHS external hard drive.
Pupil's Work	Current year + 1 year (if essential)	Off-roll on OHS MIS at point of discharge. Annual deletion from OHS MIS at the end of each academic year. Anonymized examples may be retained for case study / internal standardization	SECURE DISPOSAL	A review of data stored will take place prior to annual deletion to ensure that 'enrolled schools' receive encrypted records held by the OHS. A receipt of records sent to enrolled schools will be saved on the secure OHS external hard drive.
Consents relating to school activities		Duration of admission	SECURE DISPOSAL	
Attendance registers	3 years from the date of the attendance code is entered	Off-roll on OHS MIS at point of discharge. Annual deletion from OHS MIS at the end of each academic year For EHE pupils, 3 years from the date of the attendance code is entered	SECURE DISPOSAL	A review of data stored will take place prior to annual deletion to ensure that 'enrolled schools' receive encrypted records held by the OHS. A receipt of records sent to enrolled schools will be saved on the secure OHS external hard drive.

Pupil Records - Educational Records				
Basic File Description	Retention Period: Enrolled School	Retention Period: OHS	Disposal Process: OHS	Important Considerations (OHS)
Correspondence relating to attendance	Current academic year + 2	Off-roll on OHS MIS at point of discharge. Annual deletion from OHS MIS at the end of each academic year. For EHE pupils, all information is shared directly to the EHE caseworker and to EHE@oxfordshire.gov.uk for upload to their data system.	SECURE DISPOSAL	

Curriculum				
Basic File Description	Retention Period: Enrolled School	Retention Period: OHS	Disposal Process: OHS	Important Considerations (OHS)
Examination Records - certificates	Current year + 6 years	Off-roll on OHS MIS at point of discharge. Annual deletion from OHS MIS at the end of each academic year For EHE pupils, all information is shared directly to the EHE caseworker and to EHE@oxfordshire.gov.uk for upload to their data system.	SECURE DISPOSAL	A review of data stored will take place prior to annual deletion to ensure that 'enrolled schools' receive encrypted records held by the OHS. A receipt of records sent to enrolled schools will be saved on the secure OHS external hard drive. All uncollected certificates will be returned to the examination board
Examination Results (School Copy)	Current year + 6 years	Off-roll on OHS MIS at point of discharge. Annual deletion from OHS MIS at the end of each academic year For EHE pupils, current year + 6	SECURE DISPOSAL	A review of data stored will take place prior to annual deletion to ensure that 'enrolled schools' receive encrypted records held by the OHS. A receipt of records sent to enrolled schools will be

Curriculum				
Basic File Description	Retention Period: Enrolled School	Retention Period: OHS	Disposal Process: OHS	Important Considerations (OHS)
				saved on the secure OHS external hard drive.
Exam papers		Until the appeals / validation process is complete	SECURE DISPOSAL	
Internal moderation		Academic year + 1 year	SECURE DISPOSAL	
Curriculum Returns	Current year + 3 years		SECURE DISPOSAL	
Non-generic Schemes of Work	Current year + 1 year	Current year + 1 year	SECURE DISPOSAL	
Timetables				
Pupil / Class Record Books				
Mark Books				
Record of HWK set				

School Administration returns			
Basic File Description	Retention Period: OHS	Disposal Process: OHS	Important Considerations (OHS)
Annual Census	Current year + 6	SECURE DISPOSAL	
Annual Safeguarding Return	Current year + 6	SECURE DISPOSAL	
Ofsted reports	Life of the report then review	SECURE DISPOSAL	

Note:
School operational data is stored on the OHS Google Drive, Lyra. A review of all files stored on Lyra be undertaken annual with the purpose of unnecessary files.