



## **Records Management Policy**

## 1. Monitoring and Review

The Headteacher and Data Protection Officer monitor and review this policy.

This policy will be reviewed every two years by the full Governing Body.

**Created:** May 2018

**Revised:** March 2024

**Ratified by the Governing Body:** May 2018

**Date of Last Review:** March 2024

**Date of Next Review:** Spring 2026

Change History	Date	Change(s) Made	Change Author	EDI <sup>1</sup>
V1.3	Mar 2024	Policy reviewed, section 8 updated to remove reference to the EU.	RBO	Yes
V1.2	Mar 2022	Policy reviewed, no changes	RBO	Yes
V1.1		Policy reviewed, minor changes	RBO	
V1.0		Policy Created	RBO	

## 2. Introduction

2.1 The Reach Free School recognises that by efficiently managing its records, it will be able to comply with its legal and regulatory obligations and contribute to the effective overall management of the school. Records provide evidence for protecting the school's legal rights and interests and demonstrating performance and accountability. This document provides the framework through which effective management can be achieved and audited.

## 3. Scope of the Policy

3.1 This policy applies to all records created, received or maintained by school staff while carrying out its functions.

3.2 Records are defined as all documents that facilitate the school's business and are thereafter retained (for a set period) to provide evidence of its transactions or activities. These records may be created or received and then stored in hard copy or electronically.

## 4. Responsibilities

4.1 The school has a corporate responsibility to maintain its records and record-keeping systems in accordance with the regulatory environment. The person with overall responsibility for this policy is the Headteacher.

4.2 The Headteacher, as the person responsible for records management in the school, will be assisted by the Data Protection Officer. They will give guidance about good records management practice and will promote compliance with this policy so that information will be retrieved easily, appropriately and in a timely way. They will also monitor compliance with this policy by surveying annually to check if records are stored securely and can be accessed appropriately.

4.3 Individual employees must ensure that the records they are responsible for are accurate, maintained, and disposed of in accordance with this document.

## 5. Managing Pupil Records

5.1 A pupil's record should be seen as the core record charting an individual's progress through

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<sup>1</sup> Any changes or revisions to the policy have considered equality, diversity and inclusion.

their education. The pupil record should accompany the pupil to every school they attend and contain accurate, objective and easy-to-access information.

5.2 Pupil records are stored electronically on the school's management information system and in hard copy in a secure filing cabinet.

### **5.3 Recording information**

5.3.1 A pupil has the legal right to see their file at any point during their education and even until the record is destroyed (when the pupil is 25 years of age or 35 years from the date of closure for pupils with special educational needs). This is their right under the General Data Protection Regulation. It is important to remember that all information should be accurately recorded, objective in nature and expressed in a professional manner.

5.3.2 The pupil record starts when a file is opened for each new pupil as they begin school. This file will follow the pupil for the rest of their time at the school. The following information will appear in the file:

- Surname
- Forename
- Date of Birth
- Emergency contact details
- Gender
- Preferred name
- Position in family

5.3.3 On the Pupil Registration Form, the following information is accessible:

- Ethnic origin and Special Educational Needs (although these are classed as 'special category' data under General Data Protection Regulation)
- Language of home (if other than English)
- Names of parents, guardians or carers with home address and telephone number (and any additional relevant carers and their relationship to the child)
- Name of the school, and the date of admission and the date of leaving
- Any other medical involvement, e.g. speech and language therapist, paediatrician
- Parental permission for photographs to be taken (or not)
- Any relevant medical information

5.3.4 Additional information stored on the file can include:

- Child protection reports/disclosures are stored with the Safeguarding Team
- Any information relating to exclusions (fixed or permanent)
- Any correspondence with parents or outside agencies pertaining to major issues
- Details of any complaints made by the parents, guardians or carers or the pupil

5.4 The following are subject to shorter retention periods, and if they are placed on the file, they will need to be reviewed once the pupil leaves the school.

- Absence notes
- Correspondence with parents about minor issues

## **6. Responsibility for the pupil record once the pupil leaves the school**

6.1 The school the pupil attended until statutory school leaving age (or the school where the pupil completed year 13) is responsible for retaining the pupil record until the pupil reaches the age of 25. This retention is set in line with the Limitation Act 1980, which allows a claim to be made against an organisation by a minor for up to 7 years from their 18<sup>th</sup> birthday.

## **7. Safe destruction of the pupil record**

7.1 The printed pupil records should be disposed of in accordance with the safe disposal of records guidelines.

## **8. Transfer of a pupil record outside the UK**

8.1 If you are requested to transfer a pupil file outside the UK because a pupil has moved outside the UK, please seek pupil and/or parental consent.

## **9. Storage of pupil records**

9.1 All pupil records should be kept securely at all times. Paper records, for example, should be kept in lockable storage areas with restricted access, and the contents should be secure within the file. Equally, electronic records should be secure and stored in electronic password-protected areas.

## **10. Links with Other Policies**

This Records Management Policy has links to:

- Freedom of Information Policy
- Data Protection Policy
- Examinations Policy