



Wychwood School

Retention of Documents Policy
Author: AKJ
Last Reviewed: February 2019
Date of Next Review: February 2021

Aims

The aim of this policy is to provide guidelines for the information of parents, staff, pupils and former pupils as to the length of time Wychwood School will retain various types of data.

Principles

The Data Protection Act 1998 states that personal data must not be kept for any longer than is reasonably necessary for its particular purpose. This policy will be reviewed in the light of GDPR once the requirements become available.

We also aim to abide by the limitation periods set out in law for various categories of document.

Employees of Wychwood School may not under any circumstances dispose of a document about which they are uncertain without the express permission of the Head or the Chair of Governors.

| Document | Category | Retention time | Storage medium | Location |
|-----------------------------|-----------------|--|-----------------------|---|
| Board Minutes | Company | 10 years for paper, permanently for electronic | Paper and Electronic | Paper - Bursar's office. Electronic in the Electronic Archive |
| Finance Committee Minutes | Company | 10 years for paper, permanently for electronic | Paper and electronic | Paper - Bursar's office. Electronic in the Electronic Archive |
| Education Committee Minutes | Company | 10 years for paper, permanently for electronic | Paper and electronic | Paper - Bursar's office. |
| Council Minutes | Company | Permanently | Paper | Head's office |
| SMT Minutes | Company | 10 years for paper, permanently for electronic | Paper and electronic | Head's office and Electronic Archive |

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|--|------------|--|-----------------------------|--|
| Staff Meeting Minutes | Company | 10 years for paper, permanently for electronic | Paper and electronic | Head's office and Electronic Archive |
| Staff Appraisal Statements | Company | For the duration of employment and for 6 years after the member of staff leaves Wychwood | Paper and Electronic | Staff files – current and archive and Electronic Archive |
| Tax Records, including PAYE data | Financial | 6 years from end of accounting period to which they relate | Paper and Electronic (PASS) | Bursar's office |
| Personnel Files | Employment | 6 years from end of employment | Paper | School office |
| Accident Books | H&S | Permanently | Paper | Bursar's office |
| Records of Reportable Injuries | H&S | Permanently | Paper | Bursar's office |
| Health and Safety Records | H&S | 50 years | Paper and Electronic | Bursar's office |
| Girls' GCSE and A-level Examination Certificate Copies | Personal | Permanently | Paper | Archive |
| Girls Extra-Curricular Certificates | Personal | 2 years | Paper | Archive |
| Girls' Reports | Personal | 7 years | Electronic and paper | Archive |
| Girls' Weeded Files | Personal | Permanently | Paper | Archive |
| Girls' Mock results | Personal | To be kept until the girl stops doing the subject within Wychwood | Paper | Departmental filing |
| Girls' SEND files | Personal | 25 after girl leaves (JCQ Inspector's advice) | Paper | Archive |
| Girls' School Health Records | Personal | Until girls reach 25 years of age | Electronic (PASS) | School office and Archive |
| DBS checks | Personal | A maximum of 6 months after check is received | Paper | Accounts Assistant's office |
| Marsh Insurance | Financial | Permanently | Paper | Archive |

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|------------------------------------|-----------|---|----------------------|--|
| Tax returns | Financial | 7 years | Electronic | Bursar's PC/Area of network |
| Bank Payments | Financial | 7 years | Electronic | Bursar's PC/Area of network |
| Bank Receipts | Financial | 7 years | Electronic | Bursar's PC/Area of network |
| Cheque books | Financial | 7 years | Paper | Bursar's office |
| Credit card statements | Financial | 7 years | Electronic | Bursar's PC/Area of network |
| Electricity bills | Financial | 7 years | Paper and electronic | School office/Accounts Assistant area of network |
| Manual cheques | Financial | 7 years | Paper | Bursar's office |
| Paying in books | Financial | 7 years | Paper | Bursar's office |
| Billing ledger | Financial | 7 years | Electronic | PASS |
| Finance journals & notes | Financial | 7 years | Electronic | PASS and with Auditor |
| Petty cash books | Financial | 7 years | Paper | School office |
| Teachers' Pension submissions | Financial | 7 years | Electronic | PASS |
| People's Pension submission | Financial | 7 years but currently from inception in 2014. | Electronic | PASS |
| BACS | Financial | 7 years | Paper and electronic | Bursar's PC/Area of network |
| Finance Meeting minutes & accounts | Financial | Permanently | Paper and electronic | Bursar's office and Archive |
| Payroll checklist | Financial | 7 years | Paper and electronic | Bursar's office and Archive |
| Purchase ledger | Financial | 7 years | Paper and electronic | School office and Archive |
| Appeal | Financial | Permanently | Paper and electronic | Archive |
| Board members, former | Financial | Permanently | Paper and electronic | Archive |
| Charity Commission returns | Financial | Permanently | Paper and electronic | Bursar's office |
| Hut project | Financial | Permanently | Paper | Archive |

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|---------------------------------|------------|--------------------------------|----------------------|-----------------------------------|
| Board files | Company | Permanently | Paper and electronic | Bursar's office and Head's office |
| Petty cash receipts | Financial | 7 years | Paper | School office and Archive |
| Kitchen invoices | Financial | 7 years | Paper | School office and Archive |
| Invoices | Financial | 7 years | Paper | School office and Archive |
| Personnel records /Staff Files | Employment | 6 years from end of employment | Paper | School office and Archive |
| Old ledgers misc | Financial | 7 years | Paper | Archive |
| Admissions Data for Non-Joiners | Admissions | 7 years | Paper and Electronic | M&A office and Archive |