

## HUB

### INTRODUCTION TO TOP 10 KEY RETENTION PERIODS FOR SCHOOLS - OVERVIEW

#### Pupil Records (Primary)

Retain until the pupil transfers to another school

To ensure continuity of education and safeguarding information. (IRMS Toolkit)

#### Pupil Records (Secondary)

Retain for 25 years from the date of birth

Supports potential safeguarding or legal investigations. (DfE / IRMS)

#### Child Protection Records

Retain for 25 years from the date of birth, or longer if an ongoing issue exists

Statutory safeguarding requirements (KCSIE / Working Together to Safeguard Children)

#### Special Educational Needs (SEN) Files

Retain for 25 years from the date of birth

Covers legal challenges and future support needs (SEND Code of Practice).

#### Educational Health Care Plans (EHCPs)

Retain for 25 years from the date of birth (or until the plan is replaced or ceased + 6 years)

Ensures compliance with SEND Code of Practice 2015 and GDPR accountability for children with long-term needs.

#### Staff Personnel Files

Retain for 6 years after employment ends

Limitation Act 1980 – supports employment and legal claims.

#### Payroll, Pensions, and Salary Records

Retain for 6 years (financial) / 12 years (pension)

HMRC and pension scheme compliance.

#### Recruitment Records (Unsuccessful Candidates)

Retain for 6 months after decision

Equality Act 2010 – protects against discrimination claims.

#### Accident / Incident Reports (Pupils)

Retain for 25 years from the date of birth

To cover potential child injury claims under Limitation Act.

#### Accident / Incident Reports (Staff / Adults)

Retain for 6 years after the incident

For compliance and liability protection under Limitation Act.

#### NOTES ON EHCP RETENTION

- EHCPs and associated case files include highly sensitive personal data (health, social care, and educational information).
- Where a child transitions to another school, the current version of the EHCP should be transferred securely.
- If the plan ceases (e.g., the child leaves education or the plan is replaced), retain it for a minimum of 6 years, but best practice remains up to 25 years from birth for safeguarding continuity.

