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Education retention schedule

Last Modified February 09, 2021



Type of record	Description of record and examples	Storage media	Retention and disposal	Legislation or regulations
Admissions and Transfers Processing	Primary and secondary school admissions and transfers excluding appeals processing.	Electronic and paper.	1 academic year plus current academic year. Secure disposal.	School Admissions Code 2012; School Standards and Framework Act 1998 Part III.
Appeals Administration	Administration of appeals panel and council case preparation including school exclusions, admissions, statementing and home-school transport appeals. Excludes advocacy and parental support relating to appeals process.	Electronic and paper.	Paper - destroyed immediately after the meeting. Electronic - 1 academic year plus current academic year. Secure disposal.	School Admissions Code 2012; School Standards and Framework Act 1998 Part III.
Student Awards	Records and files relating to student awards.	Electronic and paper.	6 years after award. Secure disposal.	HMRC Compliance Handbook Manual CH15400.
Post 16 Years Access Funds	Records and files relating to post 16 years access fund awards.	Electronic and paper.	6 years after award. Secure disposal.	HMRC Compliance Handbook Manual CH15400.
University/College Student Awards	Records and files relating to university and or college awards for students.	Electronic and paper.	6 years after award. Secure disposal.	HMRC Compliance Handbook Manual CH15400.
Free School Meals	Copies of application forms and details of parent/guardian and child.	Electronic and paper.	6 years after award. Secure disposal.	HMRC Compliance Handbook Manual

				CH15400.
Pupil Records	General pupil records containing name, date of birth, school history etc.	Electronic.	Until individual's 25 th birthday unless looked after, SEN, or adopted when further retention periods apply (see relevant retention schedule entries). Secure disposal.	Limitation Act 1980, Section 2.
Examination Results	Details of external and internal examination results for all pupils.	Electronic.	Until individual's 25 th birthday unless looked after, SEN, or adopted when further retention periods apply (see relevant retention schedule entries). Secure disposal.	Limitation Act 1980, Section 2.
Statutory Returns	Statutory returns for pupil records including DfES PLASC returns.	Electronic.	Until individual's 25 th birthday unless looked after, SEN, or adopted when further retention periods apply (see relevant retention schedule entries). Secure disposal.	Limitation Act 1980, Section 2.
Student Mobility	Reports on student mobility.	Electronic.	Until individual's 25 th birthday unless looked after, SEN, or adopted when further retention periods apply (see relevant retention schedule entries). Secure disposal.	Limitation Act 1980, Section 2.
School Organisation	Review of school places including development and submission of proposals for expansion or reduction in capacity.	Electronic.	6 years after end of review, or the decision not to proceed or completion of implementation. Secure disposal.	
Educational Psychology Service	Records of referral including date referred, source, data seen, details of child's work, conversation with all parties, reports and report from other agencies and correspondence.	Electronic.	Until individual's 25 th birthday unless looked after, SEN, or adopted when further retention periods apply (see relevant retention schedule entries). Secure disposal.	Limitation Act 1980, Section 5; Children and Families Act 2104, Part 3.
			75 years from date of	Care Planning,

Virtual Schools Network	Education reports for Looked After Children.	Electronic.	<p>birth or 15 years from date of death if child dies before 18 years.</p> <p>Secure disposal.</p>	Placement and Care Review (England) Regulations 2010, Section 50.
Special Educational Needs (SEN)	Copies of applications, SEN assessments and statements, EHC plans, Pupil files and SEN tribunal files.	Electronic.	<p>Until end of academic year in which person has 31st Birthday.</p> <p>Secure disposal.</p>	Limitation Act 1980, Section 2.
Inclusion Team and Early Years SEND	Copies of applications, pupil details, SEN details and advisory reports.	Electronic.	<p>Until individual's 25th birthday unless looked after, SEN, or adopted when further retention periods apply (see relevant retention schedule entries).</p> <p>Secure disposal.</p>	Limitation Act 1980, Section 5.
SEND Independent Advisory Service	Details relating to child and parent/carer/guardian. Notes of meetings with all concerned including school and Council.	Electronic.	<p>Until end of academic year in which person has 31st Birthday.</p> <p>Secure disposal.</p>	Limitation Act 1980, Section 2.
Physical and Sensory Disability/Complex Learning Difficulties Support	Copies of application and assessment records.	Electronic.	<p>Until individual's 25th birthday unless looked after, SEN, or adopted when further retention periods apply (see relevant retention schedule entries).</p> <p>Secure disposal.</p>	Limitation Act 1980, Section 5.
Pupil Services - Racist Incidents	Details of racist incidents within schools.	Electronic.	<p>6 years after end of academic year.</p> <p>Secure disposal.</p>	
Pupil Licences	Records of licences for children in employment, child performer and child chaperone.	Electronic.	<p>Until individual's 25th birthday unless looked after, SEN, or adopted when further retention periods apply (see relevant retention schedule entries).</p> <p>Secure disposal.</p>	Children and Young Persons Act 1993.
Pupil Welfare Attendance Records	Records and case files relating to individual pupils and their school attendance. Includes diary notes and correspondence.	Electronic and paper.	<p>Until individual's 25th birthday unless looked after, SEN, or adopted when further retention periods apply (see relevant retention schedule entries).</p>	<p>Education Act 1996;</p> <p>Limitation Act 1980, Section 2.</p>

			Secure disposal.	
Pupil Welfare Legal Proceedings	Copies of files or notes relating to legal proceedings for pupil welfare and school attendance.	Electronic and paper.	Until individual's 25 th birthday unless looked after, SEN, or adopted when further retention periods apply (see relevant retention schedule entries). Secure disposal.	Education Act 1996; Limitation Act 1980, Section 2.
Inclusion or Exclusion Sweeps	Details of inclusion or exclusion sweeps conducted under legislation.	Electronic.	Authorised absence - immediate deletion. Unauthorised absence - until no longer required for further proceedings. Secure disposal.	Crime and Disorder Act, Section 16; Education Act 1996, Sections 7 and 44.
Private, Voluntary and Independent Nurseries, Registered Childminders and School Nurseries	Business contact information, including telephone, email addresses and key staff. Details of vacancy data and fees are also maintained for the purposes of sufficiency assessment and planning.	Electronic.	Until superseded. Secure disposal.	Childcare Act 2006.
Early Years Visits	Records and reports of visits to settings, child minders and schools. Checks are made to ensure that funding is being paid and used appropriately in accordance with regulations.	Electronic.	Until superseded. Secure disposal.	Childcare Act 2006.
Nursery Education Grant	Financial records are maintained in respect of funding payments made to providers for provision of early education.	Electronic.	6 financial years after date of award. Secure disposal.	Childcare Act 2006; HMRS Compliance Handbook Manual CH15400.
Children and Parents	Records are maintained of children and their parents that are in receipt of early years funded education. Eligibility checks are made and the results of checks are maintained to evidence proper use of public funds.	Electronic.		
Family Information Service	Contact details and requests for information.	Electronic.	Until superseded or they withdraw consent. Secure disposal.	Childcare Act 2006.
Newly Qualified Teachers	Professional development of Newly Qualified Teachers (NQT) including post in school, induction period status and termly assessment forms.	Electronic.	6 years after end of academic year. Secure disposal.	

School Improvement Inspections	Advisory inspection reports and records.	Electronic.	6 years plus current academic year. Secure disposal.	The Education (National Curriculum)(Key Stage 1 Assessment Arrangements) (England) Order 2004.
School Improvement Assessments	Assessments and moderation function. Information includes pupil names, education setting, date of birth and attainment results.	Electronic.	6 years plus current academic year. Secure disposal.	The Education (National Curriculum)(Key Stage 1 Assessment Arrangements) (England) Order 2004.

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