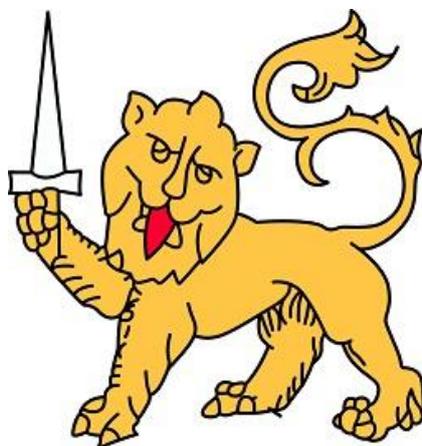


Federation Record Retention Policy

Aylestone School federated with Broadlands Primary and Withington Primary



Approved by:

Federation Governors

Date:

Last reviewed on:

25th May 2018

Next review due by:

25th May 2021

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Introduction.

Section 46 of the Freedom of Information Act 2000 requires schools to follow a Code of Practice on managing their records. Under section 7 of the Code of Practice on the Management of Records, it states that:

“Authorities should have in place a records management policy, either as a separate policy or as part of a wider information or knowledge management policy.”

Furthermore, schools must ensure that educational records are maintained and disclosed to parents on request, as noted in the Education (Pupil Information) (England) Regulations 2005 (SI 2005/1437) (<http://www.legislation.gov.uk/uksi/2005/1437/made>). Educational records include information and pupils and former pupils:

- Processed by, or on behalf of, the governing body or a teacher
- Originating from or supplied by local authority employees (for certain schools)
- Originating from or supplied by teachers or other employees of the school.

The Federation recognises the necessity for the efficient management of its records to comply with its legal and regulatory obligations, and to contribute to the effective overall management of the school.

Scope of the Policy

This policy applies to all records that are created, received or maintained by staff of the school in the course of carrying out its functions.

Records are defined as all those documents which facilitate the business carried out by the school and which are thereafter retained (for a set period) to provide evidence of its transactions or activities. These records may be created, received or maintained in hard copy or electronically.

A small percentage of the school's records will be selected for permanent preservation as part of the institution's archives and for historical research.

Records processed by a teacher solely for the teacher's own use will be excluded from pupils' educational records.

Schools must also keep curricular records on every pupil. Curricular records form a 'subset' of a pupil's educational record. They are a formal record of a pupil's academic achievement, skills, abilities and the progress they make at a school. They must be updated at least once a year.

Responsibilities

Under the Data Protection Act 1998 (DPA), schools are responsible for ensuring that the collation, retention, storage and security of all personal information they produce and hold meets the provisions of the DPA:

- Personal information appearing in a pupil's educational record
- Any other information they hold which identifies individuals, including pupils, staff and parents

Aylestone School federated with Broadlands Primary and Withington Primary is registered as a data controller with the Information Commissioner's Office (ICO).

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 Head of the School. The Data Protection Officer will give guidance for good records management practice and will promote compliance with this policy so that information will be retrieved easily, appropriately and in a timely manner.

Individual staff and employees must ensure that records for which they are responsible are accurate, and are maintained and disposed of in accordance with the school's records management guidelines.

Disclosure of Educational Records

There are several pieces of legislation under which information may be accessed from public organisations, including schools. These include the DPA and the Freedom of Information Act 2000. Access to a pupil's educational information is most appropriately covered by the right of access under the Pupil Information Regulations.

All information incorporated within a pupil's educational record constitutes personal data under the GDPR. It is therefore subject to disclosure following a written subject access request by the pupil or a parent on their behalf.

Under these Regulations a school's governing body must ensure that a pupil's educational record is made available for parents to see within 15 school days of receipt of the parent's written request. If a parent makes a written request for a copy of the record this must also be provided within 15 school days. The governing body may charge a fee for the copy but if they do, the fee must not be more than the cost of supply.

The Regulations describe the material that is exempt from disclosure to parents. This relates to information that the pupil couldn't lawfully be given under the Data Protection Act 1998. It also relates to information which s/he wouldn't have right of access to under that Act, or by virtue of any order made under section 30(2) or section 38(1) of the Act. This includes material which may cause serious harm to the physical or mental health or condition of the pupil or someone else. A school may not fulfil a parent's request for these records if there is a court order in place which limits a parent's exercise of parental responsibility. This affects the parent's entitlement to receive such information.

Transferring records to a pupil's new school

Headteachers at maintained schools must ensure the statutory requirements for the transfer of records between schools are fulfilled, including the completion of the common transfer file (CTF). This is noted in the Education (Pupil Information) (England) Regulations 2005, SI 2005/1437.

If a pupil moves to another school in England, Wales, Scotland or Northern Ireland, the pupil's CTF and educational record must be passed to the new school.

The means of transfer to a school outside England must be in line with the arrangements for transfer between schools in England. Information must be transferred within 15 school days of any request from the pupil's new school. The pupil's CTF should be sent to the new school either:

- Through the school to school (s2s) secure file transfer system
- Over a secure network that can only be accessed by the LA, the governing body or a teacher at any school within that LA.

If the new school is unknown, the Department for Education recommends that the school should still complete the CTF and load it onto s2s. Where a CTF has not been received for a new pupil a request can be made to the LA to search for the files on s2s.

Requests to transfer a pupil file outside the EU area because a pupil has moved into that area, must be referred to the Local Authority for further advice.

6. Recording Systems

Information created by the school must be managed against the same standards regardless of the media in which it is stored.

- Record Retention Schedule – Appendix 1.

Electronic Records

The legal obligation to properly manage records, including compliance with General Data Protection legislation, applies equally to electronic records. The main considerations for the management of electronic records are therefore the same as those for manual records. They include:

- Staff must be able to use and access electronic information effectively.
- Adequate measures must be in place to ensure all information is stored securely and only available to authorised persons.
- A school must be able to demonstrate a record's authenticity by ensuring information cannot be altered when declared a record.
- A system must be in place for disposing of electronic records in line with policy once they are no longer needed.

In addition to the above, sufficient backup/recovery processes must be in place. There must also be a process through which links are created from electronic records to any associated manual records. This is to ensure a full record can be considered when necessary, i.e. when decision making, providing access or considering a record for disposal.

The Safe Disposal of Information Using the Retention Schedule

Files should be disposed of in line with the attached retention schedule (see Appendix C). Other files can be disposed of to the waste paper merchant. Loose papers should not be put in skips unless the skip has a lid.

Electronic data should be archived on electronic media and 'deleted' appropriately at the end of the retention period.

Monitoring and Review

This policy has been reviewed and approved by the Headteacher and Governors. The Records Management Policy will be reviewed every 3 years.

Compiled by: Rebecca Kastania Date: May 2018

Date for review: May 2021

Aylestone School Federated with Broadlands Primary and Withington Primary School Records Management Policy

Appendix 1 Record Retention Schedule.

Student Records	Primary	Vol Sec.	C&C	ETB	Final disposition	Comments
Registers/Roll books	Indefinitely	Indefinitely	Indefinitely	Indefinitely	N/A	Indefinitely. Archive when class leaves + 2 years
State exam results	N/A	N/A	N/A	N/A	N/A	SEC responsibility to retain, not a requirement for school/ETB to retain.

Records relating to pupils/students	Primary	Vol.Sec	C&C	ETB	Confidential shredding	Comments
Enrolment Forms	Student reaching 18 years + 7 years	Student reaching 18 years + 7 years	Student reaching 18 years + 7 years	Student reaching 18 years + 7 years	Confidential shredding	18 is age of majority plus 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school)
Student transfer forms (Applies from primary to primary; from one second-level school to another)	If a form is used- Student reaching 18 years + 7 years	Confidential shredding	Student reaching 18 years + 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school)			
Disciplinary notes	Never destroy	Never destroy	Never destroy	Never destroy	N/A	Never destroy

Results of in-school tests/exams (i.e. end of term, end of year exams, assessment results)	Student reaching 18 years + 7 years	Student reaching 18 years + 7 years	Student reaching 18 years + 7 years	Student reaching 18 years + 7 years	Confidential shredding	18 is age of majority plus 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school).
End of term/year reports	Student reaching 18 years + 7 years	Student reaching 18 years + 7 years	Student reaching 18 years + 7 years	Student reaching 18 years + 7 years	Confidential shredding	18 is age of majority plus 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school)
Records of school tours/trips, including permission slips, itinerary reports	Never destroy	Never destroy	Never destroy	Never destroy	N/A	Never destroy
Scholarship applications e.g. Gaeltacht, book rental scheme	Student reaching 18 years + 7 years	Student reaching 18 years + 7 years	Student reaching 18 years + 7 years	Student reaching 18 years + 7 years	Confidential shredding	18 is age of majority plus 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school)
Garda vetting form & outcome - STUDENTS	N/A as primary schools pupils will not be undergoing vetting	Record of outcome retained for 12 months.	Record of outcome retained for 12 months.	Record of outcome retained for 12 months.	Confidential shredding	Record of outcome retained for 12 months. School to retain the reference number and date of disclosure on file, which can be checked with An Garda Siochana in the future.

Sensitive Personal Data Students	Primary	Vol Sec.	C&C	ETB	Final disposition	Comments
Psychological assessments	Indefinitely	Indefinitely	Indefinitely	Indefinitely	N/A - Never destroy	Never destroy
Special Education Needs' files, reviews, correspondence and Individual Education Plans	Indefinitely	Indefinitely	Indefinitely	Indefinitely	N/A	Never destroy
Accident reports	Indefinitely	Indefinitely	Indefinitely	Indefinitely	N/A	Never destroy
Child protection records	Indefinitely	Indefinitely	Indefinitely	Indefinitely	N/A	Never destroy
Section 29 appeal records	Student reaching 18 years + 7 years	Confidential shredding	Student reaching 18 years + 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school)			
Enrolment/transfer forms where child is not enrolled or refused enrolment	Student reaching 18 years + 7 years	Confidential shredding	Student reaching 18 years + 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school)			
Records of complaints made by parents/guardians	Depends entirely on the nature of the complaint.	Depends entirely on the nature of the complaint.	Depends entirely on the nature of the complaint.	Depends entirely on the nature of the complaint.	Confidential shredding or N/A, depending on the nature of the records.	Depends entirely on the nature of the complaint. If it is child-safeguarding, a complaint relating to teacher-handling, or an accident, then retain indefinitely. Never destroy. If it is a complaint of a more mundane nature (e.g. misspelling of child's

						name, parent not being contacted to be informed of parent-teacher meeting) or other minor matter, then student reaching 18 years + 7 years (6 years in which to take a claim, and 1 year for proceedings to be served on school)
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Staff Records	Primary	Vol Sec.	C&C	ETB	Final disposition	Comments
Recruitment process Note: these suggested retention periods apply to unsuccessful candidates only. They do NOT apply to successful candidates, or candidates who are/were also employees already within your school applying for another post/position. For successful candidates, or candidates who are/were also employees already within your school applying for another post/position, see retention periods set out below.	✓	✓	✓	✓ Note: Recruitment and employment records are held at ETB Head Office in the HR and Finance Depts.	Confidential shredding	18 months from close of competition: 12 months from close of competition plus 6 months for the Equality Tribunal to inform the school that a claim is being taken.
Applications & CVs of candidates called for interview	✓	✓	✓	✓	Confidential shredding	18 months from close of competition: 12 months from close of competition plus 6 months for the Equality Tribunal to inform the school that a claim is being taken.

Database of applications	✓	✓	✓	✓	Confidential shredding	18 months from close of competition: 12 months from close of competition plus 6 months for the Equality Tribunal to inform the school that a claim is being taken.
Selection criteria	✓	✓	✓	✓	Confidential shredding	18 months from close of competition: 12 months from close of competition plus 6 months for the Equality Tribunal to inform the school that a claim is being taken.
Applications of candidates not shortlisted	✓	✓	✓	✓	Confidential shredding	18 months from close of competition: 12 months from close of competition plus 6 months for the Equality Tribunal to inform the school that a claim is being taken.
Unsolicited applications for jobs	✓	✓	✓	✓	Confidential shredding	18 months from close of competition: 12 months from close of competition plus 6 months for the Equality Tribunal to inform the school that a claim is being taken.
Candidates shortlisted but unsuccessful at interview	✓	✓	✓	✓	Confidential shredding	18 months from close of competition: 12 months from close of competition plus 6 months for the Equality Tribunal to inform the school that a claim is being taken.

Candidates shortlisted and are successful but do not accept offer	✓	✓	✓	✓	Confidential shredding	18 months from close of competition: 12 months from close of competition plus 6 months for the Equality Tribunal to inform the school that a claim is being taken.
Interview board marking scheme & board notes	✓	✓	✓	✓	Confidential shredding	18 months from close of competition: 12 months from close of competition plus 6 months for the Equality Tribunal to inform the school that a claim is being taken.
Panel recommendation by interview board	✓	✓	✓	✓	Confidential shredding	18 months from close of competition: 12 months from close of competition plus 6 months for the Equality Tribunal to inform the school that a claim is being taken.

Staff personnel files (whilst in employment)	Primary	Vol.Sec	C&C	ETB	Final Disposition	Comments
e.g. applications, qualifications, references, recruitment, job specification, contract, Teaching Council registration, records of staff training etc.				Note: records & personnel files retained at ETB head office level	Confidential shredding. Retain an anonymised sample for archival purposes.	Retain for duration of employment plus 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school)
Application &/CV	✓	✓	✓	✓	Confidential shredding	Retain for duration of employment plus 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school)
Qualifications	✓	✓	✓	✓	Confidential shredding	Retain for duration of employment plus 7 years (6 years in which to take

						a claim against the school, plus 1 year for proceedings to be served on the school)
References	✓	✓	✓	✓	Confidential shredding	Retain for duration of employment plus 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school)
Interview: database of applications (the section which relates to the employee only)	✓	✓	✓	✓	Confidential shredding	Retain for duration of employment plus 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school)
Selection criteria	✓	✓	✓	✓	Confidential shredding	Retain for duration of employment plus 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school)
Interview board marking scheme & board notes	✓	✓	✓	✓	Confidential shredding	Retain for duration of employment plus 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school)

Panel recommendation by interview board	✓	✓	✓	✓	Confidential shredding	Retain for duration of employment plus 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school)
Recruitment medical	✓	✓	✓	✓	Confidential shredding	Retain for duration of employment plus 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school)
Job specification/ description	✓	✓	✓	✓	Confidential shredding	Retain for duration of employment plus 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school)
Contract/Conditions of employment	✓	✓	✓	✓	Confidential shredding	Retain for duration of employment plus 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school)
Probation letters/forms	✓	✓	✓	✓	Confidential shredding	Retain for duration of employment plus 7 years (6 years in which to take a claim against the school, plus 1 year for

						proceedings to be served on the school)
POR applications and correspondence (whether successful or not)	✓	✓	✓	✓	Confidential shredding	Retain for duration of employment plus 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school)
Leave of absence applications				Records & personnel files retained at ETB head office level	Confidential shredding	Retain for duration of employment plus 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school)
Job share	✓	✓	✓	✓	Confidential shredding	Retain for duration of employment plus 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school)
Career Break	✓	✓	✓	✓	Confidential shredding	Retain for duration of employment plus 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school)
Maternity leave	✓	✓	✓	✓	Confidential shredding	Retain for duration of employment plus 7 years (6 years in which to take

						a claim against the school, plus 1 year for proceedings to be served on the school)
Paternity leave	✓	✓	✓	✓	Confidential shredding	Retain for 2 years following retirement/resignation or the duration of employment plus 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school) (whichever is the greater).
Parental leave	✓	✓	✓	✓	Confidential shredding	Must be kept for 8 years - Parental Leave Act 1998 Retain for 8 years or the duration of employment plus 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school) (whichever is the greater). There is a statutory requirement to retain for 8 years.
Force Majeure leave	✓	✓	✓	✓	Confidential shredding	Retain for 8 years or the duration of employment plus 7 years (6 years in which to take a claim against the school, plus 1

						year for proceedings to be served on the school) (whichever is the greater). There is a statutory requirement to retain for 8 years.
Carers leave	✓	✓	✓	✓	Confidential shredding	Must be kept for 8 years - Carer's Leave Act 2001 Retain for 8 years or the duration of employment plus 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school) (whichever is the greater). There is a statutory requirement to retain for 8 years
Working Time Act (attendance hours, holidays, breaks)	✓	✓	✓	✓	Confidential shredding	Retain for duration of employment plus 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school). There is a statutory requirement to retain for 3 years
Allegations/complaints	✓	✓	✓	✓	ETB one doesn't have a time period advised	Retain for duration of employment plus 7 years (6 years to take a claim, plus 1 year for proceedings to be

						served). Please note the relevant DES Circular re Disciplinary Procedures in relation to the period of time for which a warning remains “active” on an employee’s record.
Grievance and Disciplinary records	✓	✓	✓	✓		Retain for duration of employment plus 7 years (6 years to take a claim, plus 1 year for proceedings to be served). Please note the relevant DES Circular re Disciplinary Procedures in relation to the period of time for which a warning remains “active” on an employee’s record.

Occupational Health Records	Primary	Vol Sec.	C&C	ETB	Confidential Shredding	Comments
Sickness absence records/certificates	✓	✓	✓	Retain on staff personnel file at ETB HO	Confidential shredding Or do not destroy.	Re sick leave scheme (1 in 4 rule) ref DES C/L 0060/2010 Retain for 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school), unless sickness absence relates to an accident/injury/ incident sustained in relation to or in

						connection with the individual's duties within the school, in which case, do not destroy.
Pre-employment medical assessment	✓	✓	✓	✓	Confidential shredding Or do not destroy?	Retain for 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school), unless sickness absence relates to an accident/injury/ incident sustained in relation to or in connection with the individual's duties within the school, in which case, do not destroy.
Occupational health referral	✓	✓	✓	✓	Confidential shredding Or Do not destroy.	Retain for 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school), unless sickness absence relates to an accident/injury/ incident sustained in relation to or in connection with the individual's duties within the school, in which case, do not destroy.
Correspondence re retirement on ill-health grounds	✓	✓	✓	✓	Confidential shredding Or Do not destroy.	Retain for 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school), unless sickness absence

						relates to an accident/ injury/ incident sustained in relation to or in connection with the individual's duties within the school, in which case, do not destroy.
Accident/injury at work reports	✓	✓	✓	✓	Confidential shredding	Retain for 10 years, or the duration of the employment plus 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school), whichever is the greater (unless sickness absence relates to an accident/ injury/ incident sustained in relation to or in connection with the individual's duties within the school, in which case, do not destroy).
Medical assessments or referrals	✓	✓	✓	✓	Confidential shredding Or Do not destroy.	Retain for 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school), unless Medmark assessment relates to an accident/ injury/ incident sustained in relation to or in connection with the individual's duties within

						the school, in which case, do not destroy.
Sick leave records (sick benefit forms)	✓	✓	✓	✓	Confidential shredding	In case of audit/refunds, Current year plus 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school)

Superannuation /Pension /Retirement records	Primary	Vol Sec.	C&C	ETB	Final Disposition	Comments
Records of previous service (incl. correspondence with previous employers)	✓	✓	✓	Superannuation records are held at ETB head office in the HR and Finance Depts.	N/A	DES advise that these should be kept indefinitely.
Pension calculation	✓	✓	✓	✓	Confidential shredding	Duration of employment + 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school) or for the life of employee/former employee plus + 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served

						on the school) (whichever is the longer)
Pension increases (notification to Co. Co.)	✓	✓	✓	✓	Confidential shredding	Duration of employment + 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school) or for the life of employee/former employee plus + 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school) (whichever is the longer)
Salary claim forms	✓	✓	✓	✓	Confidential shredding	Duration of employment + 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school) or for the life of employee/former employee plus + 7 years (6 years in which to take a claim against the school, plus 1 year for proceedings to be served on the school) (whichever is the longer)

Government returns	Primary	Vol Sec.	C&C	ETB	Final disposition	Comments
Any returns which identify individual staff/pupils,				Submitted online to DES. Printout retained by ETB HO	N/A	Depends upon the nature of the return. If it relates to pay/pension/benefits of staff, keep indefinitely as per DES guidelines. If it relates to information on students, e.g. October Returns, Annual Census etc., keep in line with "Student Records" guidelines above.

Board of Management Records	Primary	Vol Sec.	C&C	ETB	Final disposition	Comments
Board agenda and minutes	✓	✓	✓	Sent to ETB for approval	N/A	Indefinitely. These should be stored securely on school property
School closure	✓	✓	✓	✓		On school closure, records should be transferred as per Records Retention in the event of school closure/amalgamation . A decommissioning exercise should take place with respect to archiving and recording data.
Other school based reports/minutes	Primary	Vol Sec.	C&C	ETB	Final disposition	Comments
CCTV recordings	✓	✓	✓	✓	Safe/secure deletion.	28 days in the normal course, but longer on a case-by-case basis e.g. where recordings/images are requested by An Garda Síochána as part of an investigation or where the records /images capture issues such as damage/vandalism to school property and where the images/recordings are retained to investigate those issues.
Principal's monthly report including staff absences	✓	✓	✓	Submitted to ETB HO	N/A	Indefinitely. Administrative log and does not relate to any one employee in

						particular: the monthly reports are not structured, either by reference to individuals or by reference to criteria relating to individuals, in such a way that specific information relating to a particular individual is readily accessible. Not a "relevant filing system".
Financial Records	Primary	Vol Sec.	C&C	ETB	Final disposition	Comments
Audited Accounts	✓	✓	✓	Retained ETB head office	n/a	Indefinitely
Payroll and taxation	✓	✓	✓	Retained ETB head office		Revenue Commissioners require that records be kept for at least six years after the end of the tax year. Records must be made available for inspection by authorised officers of the Revenue Commissioners or of the Dept. of Social Protection. Note: The DES requires of schools that "pay, taxation and related school personnel service records should be retained indefinitely within the school. These records

						can be kept either on a manual or computer system.
Invoices/back-up records/receipts	✓	✓	✓	✓	✓	Retain for 7 years

Promotion process	Primary	Vol Sec.	C&C	ETB Employment records are held at ETB head office in the HR and Finance Depts.	Final Disposition	Comments
Posts of Responsibility	✓	✓	✓		N/A	Retain indefinitely on master file as it relates to pay/pension etc. (See DES guidelines)
Calculation of service	✓	✓	✓		N/A	Retain indefinitely on master file
Promotions/POR Board master files	✓	✓	✓		N/A	Retain indefinitely on master file
Promotions/POR Boards assessment report files	✓	✓	✓		N/A	Retain original on personnel file in line with retention periods in "Staff Records" retention guidelines above
POR appeal documents	✓	✓	✓		N/A	Retain original on personnel file, and copy of master & appeal file. Retain for duration of employment + 7 years (6 years in which to take a claim, plus 1 year to serve proceedings on school). Copy on master and appeal file.

Correspondence from candidates re feedback	✓	✓	✓		N/A	Depends upon nature of feedback. If feedback is from unsuccessful candidate who is not an employee within the school, keep in line with retention periods in "Staff Records" above. If feedback is from successful candidate or from unsuccessful candidate who is already an employee within the school, keep in line with "Staff personnel while in employment" above.
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