

OAKDALE PRIMARY SCHOOL



RECORDS MANAGEMENT POLICY

Status	Statutory
Date approved	March 2025

The School recognises that by efficiently managing its records, it will be able to comply with its legal and regulatory obligations and to contribute to the effective overall management of the institution. Records provide evidence for protecting the legal rights and interests of the school, and provide evidence for demonstrating performance and accountability.

This policy applies to all records 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.

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 person responsible for records management in the school 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 way.

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.

Relationship with existing policies

This policy has been drawn up within the context of:

- Freedom of Information policy
- Data Protection policy
- and with other legislation or regulations (including GDPR, audit, equal opportunities and ethics) affecting the school.

RECORD KEEPING

Pupil Assessment information is stored electronically and password protected. This is updated each term. Hard copies of formative and summative assessments are kept in class teacher's assessment files. These may include

- Spelling/Phonics/Common Exception word assessments
- Reading, Maths and Writing assessments
- Foundation subject assessments

Children have their own personal file. These are kept in a lockable cabinet in the main office area.

In this file are:

- Confidential reports, correspondence
- Details concerning the child, address, contact numbers, authorised collection, etc.
- Pupil reports
- Attendance letters

- Medical information

Medical Records

Children with identified medical needs have documentation completed by parents and guardians. These are kept in the main office and a copy is in each child's confidential file. Notes to inform all parties about individual symptoms, treatments and medication are kept centrally with copies given to the class teacher. A list of children with medical needs is kept centrally so they can be treated effectively as necessary. Please refer to the School policy on the administration of medicines and medical care of children at school. Children's information is also kept in the staffroom with accompanying pictures to enable all staff to identify those children with medical or dietary requirements.

Records of SEND or Child Protection

These records are kept within electronic and school systems which are all password protected.

Transfer of Records between schools

When a child leaves Oakdale before the end of their primary schooling the School Administrator sends them as soon as possible. We require a receipt signature for any sensitive information (e.g. child protection records) passed on to the receiving school. A common transfer file, CTF, is sent electronically. This contains the child details and assessment data.

Secondary Transfer

A CTF is sent electronically to the new school.

SEN/CP records. When these files are transferred to the Secondary school we require a signature on a copy of the list of files to confirm receipt. Where possible we will ensure that records are delivered by hand with signed confirmation for tracking and auditing purposes.

Retention of Records

At Oakdale School we refer to the Retention Schedule published by IRMS (See appendix 1)

Produced by I Wrigley Headteacher March 2025

See <https://irms.org.uk/page/SchoolsToolkit> Toolkit for schools/Management of the school document

A hard copy of this Appendix can be found in the school office.