**office record keeping**

**Introduction:**

The School Office is central in obtaining, recording and keeping accurate records. We attempt to minimise any inaccuracies (which can arise due to many different reasons) and undertake to immediately correct any inaccurate data as soon as the matter has been brought to our attention.

Records are always updated and/or amended when pupils join or leave the school.

The School Office retains many different kinds of record (and in doing so complies with all pertinent legislation), e.g.

1. General Information & Education Records - Pupils;

2. Medical/Confidential Information - Pupils;

3. Admission Documents and Personal Information - Pupils;

4. Personnel Records (relating to personal, professional and salary issues);

5. Financial Records;

6. Policy Documents - both curricular and non-curricular.

The School is now heavily reliant on computers to process and record much of the aforementioned data. Accordingly the Trustees and the Head Teacher are registered under the Data Protection Act 1984. The School complies with the Act's 'Data Protection Principles' and reflects its spirit of openness and good practice.

**1. GENERAL INFORMATION & EDUCATIONAL RECORDS - PUPILS**

Copies of reports, pupil profiles, SATs results, the Record of Achievement and the portfolio of work are kept as general information. These records identify the work covered, the pupil's strengths and weaknesses, targets for improvement, academic achievements, general progress, etc. Such curricular records comprise the major part of a pupil's educational record. Contents of educational records must be disclosed to parents upon request within a specified time and to another school which is considering a pupil for admission or which has just admitted that pupil. (See below for details of what does not have to be revealed).

**2. MEDICAL/CONFIDENTIAL INFORMATION - PUPILS**

Medical information and confidential reports (e.g. Social Services and Psychological Reports) are kept separately from general information. See DES Circular 17.89. for further details of material that should/should not be disclosed upon request from parents. The school asks all parents of pupils starting at the school whether their child has any medical conditions, e.g. asthma. As well as keeping a note on the child's personal file a special needs record will be kept at school and will be updated, as necessary. The special needs record will show:

* personal details, doctor's name/address/phone number, hospital reference, if applicable;
* treatment needed regularly (e.g. asthma preventer);
* relief treatment (e.g. asthma reliever) if required.

**3. ADMISSION DOCUMENTS & PERSONAL INFORMATION - PUPILS**

The School keeps admission records as specified by the DfES and the Trustees.

**4. PERSONNEL RECORDS**

The School maintains detailed personnel records relating to individual employee's job descriptions, qualifications, experience, length of service, salary levels.

References written for current staff are kept securely by the Head Teacher but separate to the other personnel records.

Completed application forms and associated references for advertised positions within the school are kept securely in the Head teacher’s office until an appointment has been made. Following the appointment the successful candidate's application and associated references are forwarded to the Trustees. The other completed application forms and associated references (originals) are kept for a reasonable time in the Head Teacher's office. All copies of application forms and associated references are destroyed when an appointment has proved successful. The other original application forms and associated references are retained in case the successful applicant does not take up the post and this can then expedite the appointment of a replacement.

A single copy of each appraisal statement is securely kept in the Head Teacher's office. Appraisal statements are not kept on computers or mobile storage media.

**5. FINANCIAL RECORDS**

Records of the school's financial controls, budget and private fund finances are kept in accordance with current Trustees regulations and are readily available for inspection by the proper authorities’ charitable commission.

The following records MUST be kept for the current financial year and the previous 6 financial years:

* Copy Orders;
* Paying-in slip stubs/records;
* Signed delivery notes;
* Copy receipts for all income;
* Certified paid invoices Bank statements;
* Copy remittance advices Bank reconciliation statements;

**6. POLICY DOCUMENTS**

A full set of all school and department handbooks/policies is retained by the Head Teacher, The School Convenor and another is provided in the staff room. The Head Teacher's set is for on-site reference only and is made available to visiting inspectors, Trustees’, parents, etc. All three complete sets are maintained by the office staff.