

Retention of Documents for Schools and Nurseries

Governance and Management

| GDPR - Personal Data | Description (and notes where necessary) | Retention Period of Documents | Assume Non-Statutory unless stated | Assume Permanently unless disposal stated |
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| Potential | Agendas for Governing Body meetings | One copy should be retained with the master set of minutes. All other copies can be disposed of | | Secure disposal |
| Potential | Minutes of Governing Body meetings - Principal Set (signed) | Permanent | | |
| Potential | Clerks Copies | Date of meeting + 3 years | | Shredded |
| Potential | Reports presented to the Governing Body | Reports should be kept for a minimum of 6 years. However, if the minutes refer directly to individual reports then the reports should be kept permanently | | Secure disposal or retain with the signed set of the minutes |
| No | Meeting papers relating to the annual parents' meeting held under section 33 of the Education Act 2002 | Date of the meeting + a minimum of 6 years | Education Act 2002, Section 33 | Secure disposal |
| No | Instruments of Government including Articles of Association | Permanent | | |
| Potential | Trusts and Endowments managed by the Governing Body (including Trust Deeds, | Permanent | | |

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| | Trustees minute books, works council minutes) | | | |
| No | Policy documents created and administered by the Governing Body | Life of the policy + 3 years | | Secure disposal |
| Yes | Action plans created and administered by the Governing Body | Life of the action plan + 3 years | | Secure disposal |
| No | Records relating to complaints dealt with by the Governing Body | Date of the resolution of the complaint + a minimum of 6 years. Then review for further retention in case of contentious disputes | | Secure disposal |
| No | Annual Reports created under the requirements of the Education (Governor's Annual Reports) (England) (Amendment) Regulations 2002 | Date of report + 10 years | Education (Governor's Annual Reports) (England) (Amendment) Regulations 2002 SI 2002 No 1171 | Secure disposal |
| No | Proposals concerning the change of status of a maintained school including Specialist Status Schools and Academies | Date proposal accepted or declined+ 3 years | | Secure disposal |
| Potential | Log books of activity in the school maintained by the Head Teacher | Date of last entry in the book + a minimum of 6 years then review | | Shredded |

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| Potential | Minutes of Senior Management Team meetings and the meetings of other internal administrative bodies | Date of the meeting + 3 years then review | | Secure disposal |
| Potential | Reports created by the Head Teacher or the Management Team | Date of the report + a minimum of 3 years then review | | Secure disposal |
| Potential | Records created by head teachers, deputy head teachers, heads of year and other members of staff with administrative responsibilities | Current academic year + 6 years then review | | Secure disposal |
| Potential | Correspondence created by head teachers, deputy head teachers, heads of year and other members of staff with administrative responsibilities | Date of correspondence + 3 years then review | | Secure disposal |
| Yes | Professional Development Plans | Life of the plan + 6 years | | Secure disposal |
| No | School Development Plans | Life of the plan + 3 years | | |
| No | All records relating to the creation and implementation of the School Admissions' Policy | Life of the policy + 3 years then review | School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels December 2014 | Secure disposal |
| Yes | Admissions – if the admission is successful | Date of admission + 1 year | School Admissions Code | Secure disposal |

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| | | | Statutory guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels December 2014 | |
| Yes | Admissions – if the appeal is unsuccessful | Resolution of case + 1 year | School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels December 2014 | Secure disposal |
| Yes | Register of Admissions | Every entry in the admission register must be preserved for a period of three years after the date on which the entry was made | School attendance: Departmental advice for maintained schools, academies, independent schools and local authorities October 2014 | Review Schools may wish to consider keeping the admission register permanently as often schools receive enquiries from past pupils |

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| | | | | to confirm the dates they attended the school. |
| Yes | Admissions – Secondary Schools – Casual | Current year + 1 year | | Secure disposal |
| Yes | Proofs of address supplied by parents as part of the admissions process | Current year + 1 year | School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels December 2014 | |
| Yes | Supplementary Information form including additional information such as religion, medical conditions etc. | | | |
| Yes | For successful admissions | This information should be added to the pupil file | | Secure disposal |
| Yes | For unsuccessful admissions | This information should be added to the pupil file | | Secure disposal |
| Yes | General file series | Current year + 5 years then REVIEW | | Secure disposal |

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| No | Records relating to the creation and publication of the school brochure or prospectus | Current year + 3 years | | General waste |
| No | Records relating to the creation and distribution of circulars to staff, parents or pupils | Current year + 1 year | | General waste |
| No | Newsletters and other items with a short operational use | Current year + 1 year | | General waste |
| Yes | Visitors' Books and Signing in Sheets | Current year + 6 years then review | | Secure disposal |
| No | Records relating to the creation and management of Parent Teacher Associations and/or Old Pupils Associations | Current year + 6 years then review | | Secure disposal |

Human Resource Management

| GDPR - Personal Data | Description (and notes where necessary) | Retention Period of Documents | Assume Non-Statutory unless stated | Assume Permanently unless disposal stated |
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| Yes | All records leading up to the appointment of a new headteacher | Date of appointment + 6 years | | Secure disposal |
| Yes | All records leading up to the appointment of a new member of staff – unsuccessful candidates NOTE: 6 months to a year. (Because of the time limits in the various discrimination Acts, minimum retention periods for records relating to advertising of vacancies and job applications should be at least 6 months. A year may be more advisable as the time limits for bringing claims can be extended. Successful job applicants documents will be transferred to the personnel file in any event. | Date of appointment of successful candidate 6 months to a year | | Secure disposal |
| Yes | All records leading up to the appointment of a new member of staff – successful candidate | All the relevant information should be added to the staff personal file (see below) and all | | Secure disposal |

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| | | other information retained for 6 months | | |
| No | Pre-employment vetting information – DBS Checks | The school does not keep copies of DBS certificates. The number should be retained on the single central record | | |
| Yes | Proofs of identity collected as part of the process of checking “portable” enhanced DBS disclosure | The school does not keep copies of proof of identity. The number and a signature of the checker should be retained on the single central record | | |
| Yes | Pre-employment vetting information – Evidence proving the right to work in the United Kingdom | Where possible these documents should be added to the Staff Personnel File [see below], but if they are kept separately then the Home Office requires that the documents are kept for termination of Employment plus not less than two years | An employers guide to work checks – Home Office | |
| Yes | Personnel files and training records (including disciplinary records and working time records) | 6 years after employment ceases | Limitation Act 1980 (Section 2) | Secure disposal |
| Yes | Disciplinary Warnings | 18 months unless child protection related | | Secure disposal |
| Yes | Parental leave | 18 years from the birth of the child. | | Secure disposal |

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| Yes | Working time records | 2 years from date on which they were made. | The Working Time Regulations 1998 (SI 1998/1833). | Secure disposal |
| Yes | Annual appraisal/ assessment records | Current year + 5 years | | Secure disposal |
| Yes | Allegation of a child protection nature against a member of staff including where the allegation is unfounded | Until the person's normal retirement age or 10 years from the date of the allegation whichever is the longer then review. Note allegations that are found to be malicious should be removed from personnel files. If unfounded they are to be kept on the file and a copy provided to the person concerned | Keeping Children Safe in Education | Shredded and then Secure disposal |
| Yes | Trade union agreements | 10 years after ceasing to be effective. | | |
| No | Health and Safety Policy and Statements | Life of policy + 3 years | | Secure disposal |
| No | Assessments under health and safety regulations and records of consultations with safety representatives and committees | Permanently | | |
| Yes | Records relating to accident/ injury at work and accident reporting | Statutory retention period: 3 years from the date of the last entry (or, if the accident involves a child/ young adult, then until that person reaches the age of 21). (See below for accidents involving chemicals or asbestos). | The Reporting of Injuries, Diseases and Dangerous Occurrences Regulations 1995 (RIDDOR) (SI 1995/3163) as amended, and | Secure disposal |

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| | | | Limitation Act 1980. Special rules apply concerning incidents involving hazardous substances (see below). | |
| Yes | Medical records as specified by the Control of Substances Hazardous to Health Regulations (COSHH) | 40 years from the date of the last entry | The Control of Substances Hazardous to Health Regulations 1999 and 2002 (COSHH) (SIs 1999/437 and 2002/2677). | Secure disposal |
| Yes | Process of monitoring of areas where employees and persons are likely to have come into contact with asbestos | (medical records) 40 years from the date of the last entry; (medical examination certificates) 4 years from the date of issue. | The Control of Asbestos at Work Regulations 2002 (SI 2002/ 2675). Also see the Control of Asbestos Regulations 2006 (SI 2006/2739) and the Control of Asbestos Regulations 2012 (SI 2012/632) | Secure disposal |
| Yes | Medical records under the Ionising Radiations Regulations 1999 | 3 years after the end of the pay reference period following the one that the records cover. | The Ionising Radiations Regulations 1999 (SI 1999/3232). | |

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| Yes | Process of monitoring of areas where employees and persons are likely to have come into contact with radiation | Last action + 50 years | | Secure disposal |
| No | Fire Precautions log books | | Current year + 6 years | |
| Yes | Maternity pay records | Current year + 3 years | Statutory Maternity Pay (General) Regulations 1986 (SI1986/1960), revised 1999 (SI1999/567) | Secure disposal |
| Yes | Records held under Retirement Benefits Schemes (Information Powers) 1995 Regulations | Current year + 6 years | | Secure disposal |

Financial Management

| GDPR - Personal Data | Description (and notes where necessary) | Retention Period of Documents | Assume Non-Statutory unless stated | Assume Permanently unless disposal stated |
|----------------------|----------------------------------------------------------------------------|---------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------|
| No | Accounting Records | 3 years for private companies, 6 years for public limited companies. | Statutory authority: Section 221 of the Companies Act 1985 as modified by the Companies Acts 1989 and 2006. | |
| No | Income tax and NI returns, income tax records and correspondence with HMRC | Not less than 3 years after the end of the financial year to which they relate. | The Income Tax (Employments) Regulations 1993 (SI 1993/744) as amended, for example by The Income Tax (Employments) (Amendment No. 6) Regulations 1996 (SI 1996/2631). | |
| No | Inland Revenue/HMRC approvals | Permanently | | |

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| No | Money purchase details | 6 years after transfer or value taken. | | Secure disposal |
| No | Employer's Liability Insurance Certificate | Closure of the school + 40 years | | Secure disposal |
| No | Inventories of furniture and equipment | Current year + 6 years | | Secure disposal |
| No | Burglary, theft and vandalism report forms | Current year + 6 years | | Secure disposal |
| No | Annual Accounts | Current year + 6 years | | General disposal |
| No | Loans and grants managed by the school | Date of last payment on the loan + 12 years then review | | Secure disposal |
| Yes | Student Grant applications | Current year + 3 years | | Secure disposal |
| No | All records relating to the creation and management of budgets including the Annual Budget statement and background papers | Life of the budget + 3 years | | Secure disposal |
| Yes | National minimum wage records | 3 years after the end of the pay reference period following the one that the records cover. | National Minimum Wage Act 1998. | |
| Yes | Retirement Benefits Schemes – records of notifiable events, for example, relating to incapacity | 6 years from the end of the scheme year in which the event took place. | The Retirement Benefits Schemes (Information Powers) Regulations 1995 (SI 1995/3103) | |
| Yes | Statutory Maternity Pay records, calculations, certificates (Mat B1s) or other medical evidence | 3 years after the end of the tax year in which the maternity period ends. | The Statutory Maternity Pay (General) Regulations 1986 (SI 1986/1960) as amended. | |

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| Yes | Statutory Sick Pay records, calculations, certificates, self-certificates | The Statutory Sick Pay (Maintenance of Records) (Revocation) Regulations 2014 (SI 2014/55) abolished the former obligation on employers to keep these records. Although there is no longer a specific statutory retention period, employers still have to keep sickness records to best suit their business needs. It is advisable to keep records for at least 3 months after the end of the period of sick leave in case of a disability discrimination claim. However if there were to be a contractual claim for breach of an employment contract it may be safer to keep records for 6 years after the employment ceases. | | |
| Yes | Wage/salary records (also overtime, bonuses, expenses) | 6 years. | Taxes Management Act 1970. | |
| Yes | Senior executives' records (that is, those on a senior management team or their equivalents) | Permanently for historical purposes | | |

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| Yes | Redundancy details, calculations of payments, refunds, notification to the Secretary of State | 6 years from the date of redundancy | | |
| No | Invoices, receipts, order books and requisitions, delivery notices | Current financial year + 6 years | | Secure disposal |
| No | Records relating to the collection and banking of monies | Current financial year + 6 years | | Secure disposal |
| No | Records relating to the identification and collection of debt | Current financial year + 6 years | | Secure disposal |
| No | All records relating to the management of contracts under seal | Last payment on the contract + 12 years | Limitation Act 1980 | Secure disposal |
| No | Records relating to the monitoring of contracts | Current year + 2 years | | Secure disposal |
| No | School Fund - Cheque books, paying books, ledger, invoices, receipts, bank statements, journey books | Current year + 6 years | | Secure disposal |
| Yes | Free School Meals Registers | Current year + 6 years | | Secure disposal |
| Yes | School Meals Registers | Current year + 3 years | | Secure disposal |
| No | School Meals Summary Sheets | Current year + 3 years | | Secure disposal |

Property Management

| GDPR - Personal Data | Description (and notes where necessary) | Retention Period of Documents | Assume Non-Statutory unless stated | Assume Permanently unless disposal stated |
|----------------------|------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|-------------------------------------------|
| No | Title deeds of properties belonging to the school | Permanent. These should follow the property unless the property has been registered with the Land Registry | | |
| No | Plans of property belonging to the school | These should be retained whilst the building belongs to the school and should be passed onto any new owners if the building is leased or sold. | | |
| No | Property leased by or to the school | Expiry of lease + 6 years | | Secure disposal |
| No | Records relating to letting school premises | Current financial year + 6 years | | Secure disposal |
| No | All records relating to the maintenance of the school carried out by contractors | Current year + 6 years | | Secure disposal |
| No | All records relating to the maintenance of the school carried out by school employees incl maintenance log books | Current year + 6 years | | |

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| No | Records of tests and examinations of control systems and protective equipment under the Control of Substances Hazardous to Health Regulations (COSHH) | 5 years from the date on which the tests were carried out. | The Control of Substances Hazardous to Health Regulations 1999 & 2002 (COSHH) | |
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Pupil Management

| GDPR - Personal Data | Description (and notes where necessary) | Retention Period of Documents | Assume Non-Statutory unless stated | Assume Permanently unless disposal stated |
|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|-------------------------------------------|
| Yes | General records relating to children and young adults | General - until the child/young adult reaches the age of 21. | Limitation Act 1980. | |
| Yes | <p>Pupil's Educational Record required by The Education (Pupil Information) (England) Regulations 2005</p> <p>Primary Then the file should follow the pupil when he/she leaves the primary school.</p> <p>If the pupil transfers to an independent school, transfers to home schooling or leaves the country the file should be returned to the Local Authority to be</p> | Retain whilst the child remains in Primary School then transfer to Secondary School. | The Education (Pupil Information) (England) Regulations 2005 SI 2005 No. 1437 | See note under Primary |

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| | retained for the statutory retention period (see below) | | | |
| Yes | <p>Pupil's Educational Record required by The Education (Pupil Information) (England) Regulations 2005</p> <p>Secondary</p> <p>If the pupil transfers to an independent school, transfers to home schooling or leaves the country the file should be returned to the Local Authority to be retained for the statutory retention period (see below)</p> | Date of Birth of the pupil+ 25 years | <p>The Education (Pupil Information) (England) Regulations 2005 SI 2005 No. 1437</p> <p>Limitation Act 1980 (Section 2)</p> | Secure disposal |
| Yes | <p>Child protection files (Child missing from education, Traveller, Roma, or Gypsy and therefore removed from roll)</p> <p>Child protection files (child is removed from the roll and is Elective Home Educated)</p> | Transfer to the Local Authority on the date removed from roll – LA to keep for 25 years. | | |
| | Allegations of a child protection nature made against a member of staff (including unfounded allegations) | Retain until the normal retirement age for the member of staff or for 10 years (whichever is the longer) | | |
| Yes | Examination Results – Pupil Copies | This information should be added to the pupil file | | All uncollected certificates should be returned to the examination board. |

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| Yes | Child Protection information held on pupil file | If any records relating to child protection issues are placed on the pupil file, it should be in a sealed envelope and then retained for the same period of time as the pupil file. | Keeping Children Safe in Education | Shredded then secure disposal |
| Yes | Child protection information held in separate files | DOB of the child + 25 years then review This retention period was agreed in consultation with the Safeguarding Children Group on the understanding that the principal copy of this information will be found on the Local Authority Social Services record | | Shredded then secure disposal |
| Yes | Attendance Registers | Every entry in the attendance register must be preserved for a period of three years after the date on which the entry was made. | School attendance: Departmental advice for maintained schools, academies, independent schools and local authorities October 2014 | Secure disposal |
| Yes | Correspondence relating to authorized absence | Current academic year + 2 years | Education Act 1996 Section 7 | Secure disposal |
| Yes | Special Educational Needs files, reviews and Individual Education Plans | Date of Birth of the pupil +25 years, unless the LA inform schools to retain for longer | Limitation Act 1980 (Section 2) | Shredded then secure disposal |

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| Yes | Statement maintained under section 234 of the Education Act 1990 and any amendments made to the statement | Date of birth of the pupil+ 25 years [This would normally be retained on the pupil file] | Education Act 1996 Special Educational Needs and Disability Act 2001 Section 1 | Secure disposal unless the document is subject to a legal hold |
| Yes | Advice and information provided to parents regarding educational needs | Date of birth of the pupil+ 25 years [This would normally be retained on the pupil file] | Special Educational Needs and Disability Act 2001 Section 2 | Secure disposal unless the document is subject to a legal hold |
| Yes | Accessibility Strategy | Date of birth of the pupil+ 25 years [This would normally be retained on the pupil file] | Special Educational Needs and Disability Act 2001 Section 14 | Secure disposal unless the document is subject to a legal hold |

Curriculum

| GDPR - Personal Data | Description (and notes where necessary) | Retention Period of Documents | Assume Non-Statutory unless stated | Assume Permanently unless disposal stated |
|----------------------|-----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|-------------------------------------------|
| Yes | Curriculum returns | Current year + 3 years | | Secure disposal |
| Yes | Examination Results | Current year + 6 years | | Secure disposal |
| Yes | SATS records | The SATS results should be recorded on the pupil's educational file and will therefore be retained until the pupil reaches the age of 25 years. The school may wish to keep a composite record of all the whole year SATs results. | | Secure disposal |
| Yes | Examination Papers | These could be kept for current year + 6 years to allow suitable comparison. The examination papers should be kept until any | | Secure disposal |

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| | | appeals/validation process is complete | | |
| Yes | Published Admission Number (PAN) Reports | Current year + 6 years | | Secure disposal |
| Yes | Value Added and Contextual Data | Current year + 6 years | | Secure disposal |
| Yes | Self Evaluation Forms | Current year + 6 years | | Secure disposal |
| No | Schemes of Work, timetable, class record books, records of homework set | Current year + 1 year | | |
| No | Pupils work | Where possible pupils' work should be returned to the pupil at the end of the academic year if this is not the school's policy then current year + 1 year | | Secure disposal |

Extra Curricular Activities

| GDPR - Personal Data | Description (and notes where necessary) | Retention Period of Documents | Assume Non-Statutory unless stated | Assume Permanently unless disposal stated |
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| No | Records created by schools to obtain approval to run an Educational Visit outside the Classroom – Primary Schools | Date of visit + 14 years | Outdoor Education Advisers' Panel National Guidance website http://oeapng.info specifically Section 3 - "Legal Framework and Employer Systems" and Section 4 - "Good Practice". | Secure disposal |
| No | Records created by schools to obtain approval to run an Educational Visit | Date of visit + 10 years | Outdoor Education Advisers' Panel | |

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| | outside the Classroom – Secondary Schools | | National Guidance website http://oeapng.info specifically Section 3 - “Legal Framework and Employer Systems” and Section 4 - “Good Practice”. | |
| Yes | Parental permission slips for school trips – where there has been a no incident | Although the consent forms could be retained for DOB + 22 years, the requirement for them being needed is low and most schools do not have the storage capacity to retain every single consent form issued by the school for this period of time. | | Conclusion of the trip |
| Yes | Parental permission slips for school trips – where there has been an incident | DOB of the pupil involved in the incident + 25 years The permission slips for all the pupils on the trip need to be retained to show that the rules had been followed for all pupils | Limitation Act 1980 (Section 2) | |
| Yes | Walking Bus Registers | Date of register + 3 years This takes into account the fact that if there is an incident requiring an accident report the register will be submitted with the accident report | | Secure disposal [|

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| Yes | Day Books | Current year + 2 years then review | | |
| Yes | Reports for outside agencies - where the report has been included on the case file created by the outside agency | Whilst child is attending school and then destroy | | |
| Yes | Referral forms | While the referral is current | | |
| Yes | Contact data sheets and contact data base entries | Current year then review, if contact is no longer active then destroy | | |
| Yes | Group Registers | Current year + 2 years | | |

Local Authority and Central Government

| GDPR - Personal Data | Description (and notes where necessary) | Retention Period of Documents | Assume Non-Statutory unless stated | Assume Permanently unless disposal stated |
|----------------------|---------------------------------------------------------------|--------------------------------|------------------------------------|-------------------------------------------|
| Yes | Secondary Transfer Sheets (Primary) | Current year + 2 years | Statutory | Secure disposal |
| Yes | Attendance Returns | Current year + 1 year | Statutory | Secure disposal |
| No | School Census Returns | Current year + 5 years | Statutory | Secure disposal |
| No | Circulars and other information sent from the Local Authority | Operational use | Statutory | Secure disposal |
| No | OFSTED reports and papers | Life of the report then REVIEW | Statutory | Secure disposal |
| No | Returns made to central government | Current year + 6 years | Statutory | Secure disposal |
| No | Circulars and other information sent from central government | Operational use | Statutory | Secure disposal |