

Policies and Procedures

How long to Retain Documents/Records at Playcentre

| Category/Description | Criteria | | Minimum length of time | | | Rationale |
|--|------------------|------------|-------------------------------------|--|----------------------------|--|
| | Licensed Centres | Playgroups | Required by criteria or legislation | Recommended by Ministry | Recommended by Playcentre | |
| Emergency Drill Practices | HS8 | HS4 | | 2 years | | Past year plus current year is long enough to inform annual review of practices |
| Sleep times and checks | HS9 | - | | 2 years | | Past year plus current year is long enough to inform annual review of practices and is useful record of sleep patterns |
| Excursions Form and Excursions Risk Assessment & Management Form | HS17 | - | | 2 years | | Past year plus current year is long enough to inform annual review of practices Note that permission for Regular Excursions is kept on enrolment form which must be kept for 7 years. |
| Record of Food served | HS19 | - | 3 months | | | Provides useful information in the event of any allergic reactions that may develop in children |
| Injuries/Illness – Minor Illness, Injury or Incident Notice | HS27 | - | | 2 years | | Past year plus current year is long enough to inform review of practices and highlight ongoing issues |
| Injury/Illness- Serious Harm Investigation Form or any notifiable events | HS27 | - | 5 years | | | Health and Safety at Work Act requires this. Again enables record of ongoing issues or concerns |
| Medicine Administration Agreement – Cat I | HS28/29 | - | | 7 years | | Forms part of enrolment information that must be kept for 7 years. |
| Medicine Administration Agreement Cat ii | HS28/29 | - | | As long as the child is receiving the medicine | For 3 months following the | Recommend keep for 3 months in case any concerns arise, the documentation can be checked. |



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| | | | | | administration of the medicine | |
| Medicine Administration Agreement – Cat iii | HS28/29 | - | | 7 years | | Forms part of enrolment information that must be kept for 7 years. |
| Medicine Administration Register | HS28 | - | | 2 years | | To inform review of practices and in case of any issues arising |
| Daily Health and Safety Checklist | | | | | 2 months | Allows time to notice trends. Any issues that arise are summarised in reports for centre meetings. |
| Hazard and Risk Register | | | | | 1 year | Updated Termly – keep one year’s worth to review for issues or concerns over time. Helps record reviews and action towards addressing potential harm. |
| Information & guidance from other agencies and services – related to additional learning needs of tamariki | C13 | - | | 7 years if child specific 2 years if general advice | | If the record is for information and guidance related to a particular child, it should be kept with their enrolment record If it is for general information the Playcentre can decide. |
| Outcomes of Self Review | GMA6 | | | Until next ERO review has occurred | | Aligned to ERO’s reporting framework for quality ECE Services. Timeframe reflects need for information to be available for ERO review and to capture improvements made. |
| Formal Complaints | | | | | 2 years or for employee – until employee ends their employment | Allows for information be available in case of future action needed. |
| Safety Checking | GMA7a | | | Students = 3 years, or until 12 months after last activity in programme. | | Until the next Safety Check is conducted. Needs to be available to MoE Staff |



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| | | | | Employees = 3 years or until they leave the service. | | |
| Police Vets | | | | 3 years or until they leave the service | | |
| Unsuccessful job applicants | | | | | Police vet forms destroyed as soon as successful candidate confirmed. Other documents destroyed after 12 months. | Police vetting forms should not be kept for unsuccessful candidates. Other documents maintained in case of any concerns raised over appointment process. |
| Appraisal documents & record of PLD undertaken by employee | | | | | Up to 5 years or until the employee leaves the service | Provides record of the processes being carried out. Available for review and feedback |
| Enrolments | GMA10 | MA5 | 7 years | | | Required by Public Finance Act 1989 |
| Attendance | GMA11 | MA5 | 7 years | | | Required by Public Finance Act 1989 |
| Child Protection Concerns | | | | 7 years after child leaves Playcentre | | |
| Financial Records | | | 7 years | | | IRD requires records to be kept for 7 years from balance date. Includes all invoices, bills, bank records, and end of year accounts. Can be kept on Xero. |
| Minutes | | | | | Forever | Provides the history of the centre and useful when celebrating anniversaries etc. |
| Property Lease or ownership documents | | | | | For the length of the lease – or forever. | |



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