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Frequently Asked Questions: what records should we keep for visits?

There are two separate issues to consider here:

1. Records to keep following an accident or incident
2. General records

Record keeping following an accident/incident

Whenever there has been an accident or incident on a visit, the Visit Leader must follow their establishment's and employer's reporting procedures.

Establishments and employers should consider whether the nature of any accident or incident might, in the future, give rise to an insurance claim or a civil claim for damages. Where this is considered to be a possibility, or where an incident was reported to HSE under the Reporting of Injuries, Diseases and Dangerous Occurrence Regulations (RIDDOR), it is advisable to retain sufficient information about the visit and incident to allow the employer to investigate fully and, if necessary, defend their actions:

- Full details of the incident and any related report/witness statements/follow-up actions
- The plan for the visit (including risk management plan)
- Names of the young people and adults on the visit
- The programme of activities that took place on the visit
- The educational visits policy current at the time of the visit
- A copy of the information about the visit sent to parents prior to the visit
- A copy of the completed parent consent form(s) for anyone directly involved in the accident/incident

This information may be stored electronically.

Because of the time limits on civil claims for negligence, such records should be kept until the young person reaches age 21, or for 3 years following the incident in the case of an adult.

General record keeping

Beyond this there is no legal requirement to keep any records, although there are reasons why establishments may wish to retain general records of visits and outdoor learning experiences, for example:

- To record the range of opportunities that they provide for the young people in their care
- To record staff experience in leading visits and outdoor learning
- To demonstrate effective planning and evaluation of visits and outdoor learning
- To build a history for sharing learning and good practice

Electronic visit planning systems, which create a searchable database, are particularly useful in this respect.

Any records containing personal information must be stored securely and kept in compliance with data protection requirements. For example, unless the guidance on accidents and incidents applies, parental consent forms need only be retained until the visit (or period) covered by the consent has ended and then they may be destroyed.

