



2. ADMINISTRATION AND DATA/INFORMATION MANAGEMENT

FILING SYSTEM

Below find one of two filing systems to be considered by Principals or SMT's:

1. MEDIA SERVICES

- 1.1 Rules, regulations, prescriptions and policy.
- 1.2 General correspondence: Book lists, lists of books for rebinding, arrangements in connection with courses, annual returns, etc.
- 1.3 Purchases and rebinding.
- 1.4 Allocations and requisitions.
- 1.5 Admonitions, etc.

2 EXAMINATIONS AND PROGRESSION/PROMOTIONS

- 2.1 Rules, regulations, instructions and policy;
- 2.2 General correspondence: Examiners, moderators, tests, university entrance, internal examinations, examinations of other bodies, exemption from examination fees, etc.
- 2.3 Final examinations and supplementary examinations: Entries, averages, symbols, oral marks, practical marks, year marks, results, etc.
- 2.4 Examination timetables: Supervisors, examination papers, etc.
- 2.5 Certified statements and certificates: Applications, dispatch, etc.
- 2.6 Promotion schedules.

3 FINANCIAL

- 3.1 Rules, regulations, instructions and policy.
- 3.2 General correspondence: Bursaries, estimates, licenses, etc.
- 3.3 Insurance.
- 3.4 Investments.
- 3.5 Bursaries: Boarding, transport, approvals and claims, etc.
- 3.6 Hostel funds: UIF, PAYE, wages, bookkeeping, visitors' book, consumable stock, sale of goods, etc.
- 3.6.1 Boarding fees in arrears: Reports to the SGB, etc.
- 3.6.2 Financial returns; etc.
- 3.6.3 Boarding: Accounts to parents, etc.
- 3.6.4 Audit reports.
- 3.7 Municipal accounts: Water, electricity, sanitation – hostel and school, etc.
- 3.8 Income fund: Moneys from centres, examination fees, returns, etc.
- 3.9 School fund: Collections, exemptions, accounts, payments, bookkeeping, entertainment tax, refund on telephone account, state subsidy, etc.
- 3.9.1 Functions: Fêtes, operettas, invitations, collection lists, etc.
- 3.9.2 Tuck shop: Stock-taking, orders, payments, profit and loss accounts, etc.
- 3.9.3 Audit reports
- 3.10 Tenders.

4 BUILDINGS AND GROUNDS

- 4.1 Rules, regulations, instructions, and policy
- 4.2 General correspondence: Burglaries, wood and coal for heating, cleaning materials, water supply, use of buildings after school hours, etc.
- 4.3 Hostels: New additions, renovations, layout of gardens, purchase of site, etc.
- 4.4 Repairs: Hostel and school, and repairs to furniture and equipment, etc.
- 4.5 School: Purchase of site, erections, new additions, renovations, laying of foundation stones, lay out of gardens, etc.
- 4.6 General assistants

- 4.6.1 Employment and discharge of general assistants, payments, increases in salary for general assistants, etc.
- 4.6.2 Hostel
- 4.6.3 Farm
- 4.7 Swimming pool: Building of, purification, chemicals, cleaning, pumping installation, etc.
- 4.8 Houses and garages: Erection, new additions, renovations, returns, etc.

5 PROFESSIONAL AND OTHER REPORTS

- 5.1 Rules, regulations, instructions, and policy
- 5.2 General correspondence
- 5.3 Reports on professional visits: WSE, etc.
- 5.4 Principal's reports

6 PUPIL ACTIVITIES

- 6.1 Rules, regulations, instructions, and policy
- 6.2 General correspondence: School magazines, eisteddfods, matric/gr. 7 farewells, prefects and monitors, representative council of learners, school uniforms, badges, lost articles, etc.
- 6.3 School colours and prizes
- 6.4 Testimonials
- 6.5 Cultural societies/organizations: Debating society, youth organizations, etc.
- 6.6 Old boys and girls
- 6.7 Sport: All matters not relating to a particular type of sport
 - 6.7.1 Athletics
 - 6.7.2 Tennis
 - 6.7.3 Etc (A separate file for each type of sport)

7 MEDICAL SERVICES

- 7.1 Rules, Regulations, instructions, and policy
- 7.2 General correspondence: Safety of children, medical examination of children, injuries, infectious diseases, dental treatment, etc.
- 7.3 First aid: Requisitions, etc.
- 7.4 Purchases from school and hostel funds

8 FURNITURE AND EQUIPMENT

- 8.1 Rules, regulations, instructions, and policy
- 8.2 General correspondence: Donations, stocklist of donations, maintenance, etc.
- 8.3 Hostel: Requisitions, write-offs, annual returns, missing articles as the result of burglary, tuning of pianos, etc.
- 8.4 Machines: Tractors, lawn mowers, generators, mechanical equipment, etc.
- 8.5 Farming implements: Ploughs, harrows, rakes, etc.
- 8.6 School fund purchases
- 8.7 School: Requisitions, write-offs, annual returns, acknowledgement of receipt, missing articles as the result of burglary, tuning of pianos, etc.
- 8.8 Garden tools: Requisitions, write-offs, annual returns, etc.
- 8.9 Office equipment: Stationery, safe, strong-room, etc.

9 LEARNER AND TEACHER SUPPORT MATERIAL (LTSM)

- 9.1 Rules, regulations, instructions, and policy
- 9.2 General correspondence: Allocation, requisition and distribution, etc.
- 9.3 Apparatus
 - 9.3.1 Biology and Science
 - 9.3.2 Arts and Culture
 - 9.3.3 Etc (A separate file for every section where equipment is used)
- 9.4 Textbooks: Requisitions, orders, write-offs, catalogue, etc.
- 9.5 School material: Requisitions, orders, catalogues, etc.
- 9.6 Forms: Requisitions, orders, catalogues, etc.

10 EDUCATORS AND NON-EDUCATORS

- 10.1 Rules, regulations, instructions, and policy
- 10.2 General correspondence: Conditions of service concerning administrative, professional and domestic staff, etc.
- 10.3 Administrative: Matters which concern all administrative staff, etc.
 - 10.3.1 Senior Administration Clerk (SAC)

- 10.3.2 Caretaker
- 10.3.3 Farm foreman
- 10.3.4 Etc. (a separate file for every post)
- 10.4 Domestic: Matters which concern all domestic staff, term returns, etc.
- 10.4.1 Matron A S Hostel
- 10.4.2 Matron A Hostel
- 10.4.3 Assistant Matron A Hostel
- 10.4.4 Etc. (a separate file for each post)
- 10.5 Professional Matters which concern all professional staff, salaries of educators, number of allocated posts, IQMS, etc.
- 10.5.1 Principal
- 10.5.2 Deputy principal, etc. (a separate file for every post)
The applications for a specific post are dealt with on the post file.
- 10.6 Supervisory staff
Matters which concern all supervisory staff, etc.
- 10.6.1 Hostel
- 10.6.2 Hostel
- 10.6.3 Etc. (a separate file for each hostel)
- 11 SGB AND COMMITTEES
- 11.1 Rules, regulations, instructions, and policy
- 11.2 General correspondence: Financial Committee, Hostel Committee, etc.
- 11.3 School Governing Body: Election, vacancies, etc.
- 11.4 SGB organisations
- 12 SCHOOL ORGANISATION
- 12.1 Rules, regulations, instructions, and policy
- 12.2 General correspondence: Calendars, timetables, school hours, parent associations, telephone, mail services, etc.
- 12.3 Deviant pupils: Notifications of placement, tests conducted by the Psychological services, etc.
- 12.4 Aid classes
- 12.5 Annual returns/Statistics
- 12.6 Teacher unions: SAOU, etc.
- 12.7 Educational tours: All arrangements in connection with journeys, etc.
- 12.8 Teaching practice by students
- 12.9 Inclusion
- 12.10 Medium of instruction
- 13 SCHOOL ATTENDANCE
- 13.1 Rules, regulations, instructions, and policy
- 13.2 General correspondence: Admissions and transfers, statistics, suspensions, etc.
- 13.3 Quarterly attendance returns
- 13.4 Irregular school attendance
- 14 LEARNING AREAS/SUBJECTS
- 14.1 Rules, regulations, instructions, and policy
- 14.2 General correspondence on:
National curriculum statement, work schedules, etc. and matters pertaining to the Learning Area Coordinators, learning area reports, prescribed works, etc.
- 14.3 Languages
- 14.4 Mathematics
- 14.5 Physical Science, etc. (a separate file for each learning area/subject)
- 15 TRANSPORT
- 15.1 Rules, regulations, instructions, and policy
- 15.2 General correspondence: Municipal and private transport, school bus, etc.
- 15.3 Departmental transport schemes: Times of arrival and departure of buses, safety measures, etc. (a separate file for each scheme)
- 16 HOSTEL ORGANISATION
- 16.1 Rules, regulations, instructions, and policy

- 16.2 General correspondence: Admission of pupils, laundry, maximum accommodation, etc.
 16.3 Discipline in hostels
 16.4 Quarterly returns
 16.5 Feeding of pupils: Menus, dietary scales, etc
 16.6 Requisitions: Equipment
- 17 FARMING ACTIVITIES
 17.1 Rules, regulations, instructions, and policy
 17.2 General correspondence: Planning, fuel, oil, etc.
 17.3 Orchards
 17.4 Dairy
 17.5 Etc. (a separate file for every section)

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Below follows a second example of a filing system:

(Originally prepared for Department of Education by Palmer Development Consulting, December 2003.

Adapted for Thutong Education Portal by DEVED Trust

Example – Filing System

1. Administration

- 1.1. Policies – (departmental, school and governing body's)
- 1.2. Rules and regulations – (discipline, grievance, suspension, transfer, expulsion, awards, etc)
- 1.3. Registers – (applications, admissions, transfers, attendance, leave applications, stock, etc).
- 1.4. Reports – (principal's, PTA's, SGB's, Sub-committees, inspection, health, etc.)
- 1.5. School brochures, newsletter, and prospectus

2. Buildings and Grounds

- 2.1. Rules, regulations and policy
- 2.2. General correspondence – (telephone, burglaries, heating, water supply, use of buildings after hours, etc)
- 2.3. Repairs by SGB – (school, sport facilities, furniture and equipment)
- 2.4. School development plans – (renovations, additions, gardens, etc)
- 2.5. Maintenance of facilities – (pool, garden, tennis courts, grounds, etc)
- 2.6. Contracts of service providers

3. Curriculum

- 3.1. Rules, regulations and policy
- 3.2. General correspondence –(schemes of work, syllabi and policy documents, prescribed works, stationery requirements, learner support materials, district and circulars, etc)
- 3.3. Subject or Learning area list
- 3.4. Remedial teaching
- 3.5. Guidance and counselling, sexuality education
- 3.6. Timetables

4. Assessment and Evaluation

- 4.1. Continuous Assessment
- 4.2. CTA

5. Cultural (extracurricular) Activities

- 5.1. Art
- 5.2. Chess
- 5.3. Music
- 5.4. Plays
- 5.5. Life skills
- 5.6. Quizzes
- 5.7. Mini City Council
- 5.8. Entertainment
- 5.9. Outside productions
- 5.10. Concerts, plays, programmes tours

6. Educational Aids

- 6.1. Rules, regulations and policy
- 6.2. General correspondence – (financial allocation, stock allocation, requisition and distribution, etc)
- 6.3. Apparatus for all and particular subjects
- 6.4. School material – (stock, textbooks, etc)
- 6.5. Requisition forms
- 6.6. Annual stationery orders

7. Examinations and promotions

- 7.1. Rules, regulations and policy
- 7.2. General correspondence – (examiners, moderators, department of education, exam fees and exemptions, item banks, etc)
- 7.3. Final examinations – (entries, supplementary exams, averages, results, oral and practical assessments, year marks, etc)

7.4. Examination timetables – (supervision, moderation, examination papers, etc)

7.5. Certified statements and certificates – (applications, dispatch, etc)

7.6. Promotion schedules

8. Furniture and Equipment

8.1. Rules, regulations and policy

8.2. General correspondence – (donations, maintenance, inventories, etc)

8.3. Machines – (tractors, lawn mowers, generators, mechanical equipment)

8.4. Garden tools – (requisitions, write-offs, annual returns, etc)

8.5. Office equipment – (stationery, strong room, copier, typewriters, etc)

8.6. Cleaning supplies – (orders, receipts, etc)

8.7. Stationery supplies – (orders, receipts, etc)

8.8. Classroom furniture and equipment – (requisition, inventories, write-offs, missing, damaged, annual returns, etc)

9. Financial information

9.1. Rules, regulations and policy

9.2. General correspondence

9.3. Insurance and investments

9.4. Bank statements

9.5. School fund and trust fund – (collections, payments, exemptions, accounts, bookkeeping, etc)

9.6. Fund raising – (fêtes, plays, tuck shop, fundays etc)

9.7. Payments – (accounts, telephones, utilities, etc)

9.8. Support fund

9.9. Audit reports

9.10. School fees correspondence

10. Governing Body

10.1. Rules, regulations, policy and legislation

10.2. General correspondence

10.3. Governing body elections, vacancies, constitution, etc

10.4. Sub-committees –(PTA, Finance, etc)

10.5. General information for SGB

10.6. Minutes of meetings

11. Human Resources and School Development

11.1. Human resource development plans

11.2. Induction and orientation programmes

11.3. School development plans

12. Learners (Every learner must have their own file which includes the following)

12.1. Learner records

12.2. Special assistance

12.3. Testimonials

12.4. Personal information

12.4.1. Correspondence

12.4.2. Application form

12.4.3. Signed code of conduct & school policy

12.4.4. Extra-mural record, discipline records

12.4.5. Medical records (including allergies)

12.5. Scholar patrols, monitors, etc

12.6. Awards, prizes, merit certificates, school and sport colours, valediction, etc

12.7. Guidance

13. Media services

13.1. Rules, regulations and policy

13.2. General correspondence – (book lists, lists for rebinding, annual returns, donations, etc)

13.3. Purchases, requisitions, write-offs, allocations, etc

13.4. Computers, Internet access- records and fees paid, maintenance records

14. Medical information

14.1. Rules, regulations and policy

14.2. General correspondence

14.2.1. Children safety

14.2.2. Medical examinations

14.2.3. Injuries

14.2.4. Infectious diseases

14.2.5. Dental treatments

14.2.6. Certificates, etc

14.3. First Aid

15. Management and Organisation

15.1. Rules, regulations, policy and legislation

15.2. General correspondence (Calendar, Time-tables, Registers, Statistics etc)

15.3. Surveys (Annual, 10th Day, etc)

15.4. Discipline and Grievance – (procedures, reviews, etc)

15.5. Learners with Special needs – (reports, assistance, assessments, volunteers guidelines for the use of volunteers, intervention issues etc)

15.6. Affiliations and subscriptions – (SGB forum, SACE, Other.)

15.7. Practical teaching experience – (pre-set students)

15.8. Educational journeys – (indemnities, logistics, etc)

15.9. Marketing – (open day, new parents' evening, etc)

15.10. After-school care

15.11. Charities

16. Sport activities (Some examples)

16.1. Athletics

16.2. Cricket

16.3. Cross country

16.4. Netball

16.5. Soccer

16.6. Swimming

16.7. Tennis

16.8. Tabloid sports

16.9. House lists

17. Personnel – (administration and support)

17.1. Rules, regulations and policy

17.2. General correspondence – (conditions of service, staff development, etc)

17.3. Salaries, pensions, tax and medical aid, IRP5

17.4. Leave and sick leave

17.5. Signed duty lists

17.6. Personal information

17.7. Merit awards

18. Personnel – (Teachers and Management)

18.1. Rules, regulations and policy

18.2. Personal information

18.3. Personnel allocation of posts

18.4. Salaries and bonuses

18.5. Incentives, e.g. accommodation

18.6. Attendance and leave registers

18.7. Applications, promotions, transfers and resignations

18.8. Appointments – (temporary, permanent, probation, contractual, etc)

18.9. Interviews