

## **RETENTION AND DISPOSAL OF RECORDS**

### **Background**

Records held by the District will be retained while they are of use in the operation of the District and in compliance with pertinent federal and provincial legislation.

### **Procedures**

The following procedures are to be observed with respect to the retention and disposal of records:

1. The Principal of the school or the Supervisor of the department responsible for the records is authorized to destroy the records in accordance with the following schedule. Records may be maintained beyond the scheduled time if the Principal or Supervisor believes that they have a further use or historical or archival value.
2. The following retention schedule outlines the minimum amount of time that District records must be retained.
  - 2.1. Board Records
    - 2.1.1. Board policy – Permanent
    - 2.1.2. Agendas of regular, in-camera and special Board meetings – Permanent
    - 2.1.3. List of electors – 2 years after the year of creation
    - 2.1.4. Minutes – Permanent
    - 2.1.5. Notice of meetings – 1 year
    - 2.1.6. Oaths and declaration of trustees – Selected retention
    - 2.1.7. Trustees list – While current
    - 2.1.8. Debenture and bylaw register – Permanent
    - 2.1.9. Debenture and coupons redeemed – 6 years after year redeemed
    - 2.1.10. Annual Report as required by the School Act – Permanent
    - 2.1.11. District publications and newsletters – Selected retention
  - 2.2. Information and Privacy
    - 2.2.1. Freedom of Information requests – 2 years after the calendar year of creation
    - 2.2.2. Requests to review Freedom of Information decisions – 5 years after investigation, review, inquiry or adjudication is complete and order has been issued
    - 2.2.3. Freedom of Information request to correct personal information – 2 years after the personal information has been updated, annotated, or request has been transferred to another public body

## 2.3. Financial Records

- 2.3.1. Annual budget and summary supporting documents – Permanent
- 2.3.2. Auditor's reports – Permanent
- 2.3.3. Cancelled cheques – 6 years after year of creation
- 2.3.4. Cheque duplicates, invoices, requisitions, purchase orders – 6 years after year of creation – 2 years after year of creation
- 2.3.5. Employee travel claims – 6 years after year of creation
- 2.3.6. Ministry of Education financial information reports – Permanent
- 2.3.7. General ledger – Permanent
- 2.3.8. Invoices billed – 6 years after year of creation
- 2.3.9. Subsidiary ledgers and journals – 6 years after year of creation
- 2.3.10. Receipts issued – 6 years after year issued
- 2.3.11. Bank statements, debit and credit notes – 6 years after year of creation
- 2.3.12. Deposit books – 6 years after year of creation
- 2.3.13. Loans, authorization – 6 years or term of loan, if longer
- 2.3.14. Loans, cancelled notes – 6 years after year of creation
- 2.3.15. Stop payment orders – 1 year after year of creation

## 2.4. Facilities Records

- 2.4.1. Rental of facilities – 1 year after year of rental
- 2.4.2. Appraisal and inventory records – 6 years after year of asset disposal
- 2.4.3. Authorization for expenditure of capital funds – 6 years after year capital plan completed
- 2.4.4. Building plans and specifications – 6 years after year of asset disposal (with related change, guarantees, bonds, liens and valuable correspondence)
- 2.4.5. Land titles, deeds and plans – Permanent
- 2.4.6. Leases – 6 years after expiration of term

## 2.5. General Records

- 2.5.1. General correspondence – 2 years after year of creation

## 2.6. Human Resource Records

- 2.6.1. Applications – 1 year after position is filled
- 2.6.2. Job competitions – Selected retention
- 2.6.3. Collective Agreements with unions – Permanent
- 2.6.4. Contracts with individual employees – 20 years after the year employment ceases
- 2.6.5. Teacher-on-call files – 5 years after the year employee leaves district
- 2.6.6. Individual grievance files – Permanent

- 2.6.7. Letters of discipline – 20 years after the year employment ceases
- 2.6.8. Personnel file – 20 years after the year employment ceases
- 2.6.9. Seniority lists – Permanent
- 2.6.10. Unsolicited resumes – 6 months
- 2.6.11. Violence incident reports – 6 years after year of creation
- 2.7. Information Systems
  - 2.7.1. User ID's - When user is removed from the system
- 2.8. Insurance Records
  - 2.8.1. Incident Reports – 2 years or until finalized
  - 2.8.2. Claims – 6 years after claim settled for adults; 2 years after age of majority is reached for individuals under 19 years
  - 2.8.3. Insurance policies – While current
- 2.9. Payroll Records
  - 2.9.1. Employee payroll files – 20 years after the year employee leaves district
  - 2.9.2. Employee payroll register – 20 years after the year employee leaves district
  - 2.9.3. Employee attendance records – 6 years after the year employment ceases
- 2.10. Purchasing Records
  - 2.10.1. Quotations and relative correspondence – 6 years after year of creation
  - 2.10.2. Purchasing contracts – 6 years after year of creation
  - 2.10.3. Requisitions and purchase orders – 6 years after year of creation
- 2.11. Student Records
  - 2.11.1. Student Information Data – Permanent
  - 2.11.2. Permanent Record Cards – 55 years after graduation or withdrawal
  - 2.11.3. Attendance reports and registers – Permanent
  - 2.11.4. Out-of-boundary attendance requests – 2 years after decision is made
  - 2.11.5. Provincial scholarships and district awards – Permanent
  - 2.11.6. Transcript of Marks – Permanent
  - 2.11.7. Teachers' student files – While current
  - 2.11.8. Other student records – Useful life of record
- 2.12. Transportation Data
  - 2.12.1. Student bus registration forms – 1 year after year of creation
  - 2.12.2. Transportation assistance forms – 1 year after year of creation
  - 2.12.3. School bus behaviour report – 1 year after year of creation
  - 2.12.4. School bus video tapes – 1 year after year of creation as needed
  - 2.12.5. Vehicle maintenance forms – Life of bus

2.12.6. Pre-trip forms – 3 months

2.12.7. Driver time logs – 6 months

Reference: Sections 22, 23, 65, 85 School Act  
Document Disposal Act  
Freedom of Information and Protection of Privacy Act

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