

RETENTION AND DESTRUCTION OF RECORDS

- POLICY -

Records held by School District No. 85 will be retained while they are of use in the operation of the district and in compliance with pertinent federal and provincial legislation. A retention procedure outlines the minimum period of time which specific records must be retained.

Once records are past the applicable retention period, the principal of the school or the supervisor of the department responsible for the records is authorized to destroy them if he or she is satisfied that the records are of no further use and they have no historical or archival value. Records which contain personal or confidential information shall be destroyed in a manner that retains the confidentiality of the records.

- REGULATION -

DEFINITION:

Record: *A record includes books, documents, maps, drawings, photographs, letters, vouchers, papers and any other things on which information is recorded or stored by graphic, electronic, mechanical or other means but does not include a computer program or any other mechanism that produces records.*

The following retention schedule outlines the minimum amount of time that School District No. 85 records must be retained and who is responsible for their retention and destruction.

RECORDS	RESPONSIBILITY	RETENTION PERIOD
Board Records		
Board Policy	Superintendent	Permanent
Agendas of Regular and Special Board Meetings	Secretary-Treasurer	Permanent
Minutes	Secretary-Treasurer	Permanent

RECORDS	RESPONSIBILITY	RETENTION PERIOD
<i>Board Records (cont.)</i>		
Notice of Meetings	Secretary-Treasurer	1 year
Oaths and Declaration of Trustees	Secretary-Treasurer	For term of office
School Trustees List	Secretary-Treasurer	While current
Communications/Information & Privacy		
Freedom of Information Requests	Secretary-Treasurer	2 years after the calendar year of creation
Requests to Review Freedom of Information Decisions	Secretary-Treasurer	5 years after investigation, review, inquiry or adjudication is complete and order has been issued.
Freedom of Information requests to correct	Secretary-Treasurer	2 years after the personal information has been updated, annotated, or request has been transferred to another public body.
Financial Records		
Annual budget and summary supporting	Secretary-Treasurer	Permanent
Auditor's reports	Secretary-Treasurer	Permanent
Cancelled cheques	Secretary-Treasurer	6 years after year of creation
Cheque duplicates, invoices, requisitions, purchase orders	Accounts Payable	6 years after year of creation
Employee Travel Claims	Accounts Payable	6 years after year of creation
Boarding Allowance Claims	Accounts Payable	6 years after year of creation
Transportation Assistance Claims	Accounts Payable	6 years after year of creation
Ministry of Education financial information reports	Secretary-Treasurer	Permanent

ADOPTION DATE: Apr. 11/95

Revised: Oct/09; Apr/12; Feb/15; Oct/16; Apr/17; Jan/20

RECORDS	RESPONSIBILITY	RETENTION PERIOD
<i>Financial Records (cont.)</i>		
General Ledger	Secretary-Treasurer	Permanent
Invoices billed	Accounts Payable	6 years after year of creation
Subsidiary ledgers and journals	Secretary-Treasurer	6 years after year of creation
Receipts issued	Accounts Receivable	6 years after year issued
Bank statements, debit and credit notes	Secretary-Treasurer	6 years after year of creation
Deposit books	Accounts Receivable	6 years after year of creation
Loans, authorization	Secretary-Treasurer	6 years or term of loan, if longer
Loans, cancelled notes	Secretary-Treasurer	6 years after year of creation
Stop payment orders	Accounts Payable	1 year after year of creation
Facilities Records		
Appraisal and inventory records	Secretary-Treasurer	6 years after year of asset disposal
Rental of facilities	Operations and Maintenance	1 year after year of rental
Authorization for expenditure of capital funds	Secretary-Treasurer	6 years after year of asset disposal
Building plans and specification changes (guarantees, bonds, liens and valuable correspondence)	Operations and Maintenance	6 years after year of asset disposal
Land titles, deeds and plans	Secretary-Treasurer	6 years after year of asset disposal
Mortgages and leases	Secretary-Treasurer	6 years after expiration of term
WCB Inspection Reports	Operations and Maintenance	6 years after year of asset disposal

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RECORDS	RESPONSIBILITY	RETENTION PERIOD
<i>Facilities Records (cont.)</i>		
School Protection Program Inspection Reports	Operations and Maintenance	6 years after year of asset disposal
Fire Commission Inspection Reports	Operations and Maintenance	6 years after year of asset disposal
Reports of Consultants, Engineers, etc.	Operations and Maintenance	6 years after year of asset disposal
General Records		
General Correspondence	Author	2 years after year of creation
Human Resource Records		
Contracts with Senior Staff	Secretary-Treasurer	6 years after year employee leaves district
Employee WCB forms	Payroll	Permanent
Applications, resumes, evidence of qualifications (transcripts, certificates, etc.)	Teaching - Assist. Sup. Non-teaching - Secretary-Treasurer	Permanent if employed or 1 year after the position is filled if not employed
Collective Agreements with Unions	Secretary-Treasurer	Permanent
Contracts with individual employees	Secretary-Treasurer	Permanent
Employee Personnel files	Payroll	Permanent
First Aid Certification	Payroll	6 years after the year the employee leaves district
Leave records	Payroll	6 years after the year employee leaves district
Individual grievance files	Teaching – Assist. Sup.; Non teaching - Secretary-Treasurer	Permanent

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RECORDS	RESPONSIBILITY	RETENTION PERIOD
<i>Human Resource Records (cont.)</i>		
Letters of discipline	Teaching – Assist. Sup.; Non teaching - Secretary-Treasurer	According to collective agreement (<u>Sealed in employee personnel files</u>)
Reference checks	Supervisor for position	1 year after the position is filled
Seniority Lists	Payroll	Permanent
Extra Hours/Recall List	Secretary-Treasurer	1 year
Unsolicited resumes	Teaching - Assist. Sup.; Non-teaching - Secretary-Treasurer	6 months
Insurance Records		
Violent incident reports	Superintendent	6 years after year of creation
Incident Reports	Secretary-Treasurer	1 year or until finalized
Insurance Policies	Secretary-Treasurer	Permanent
Claims	Secretary-Treasurer	6 years after claim settled for adults; 2 years after age of majority is reached for individuals under 19 years
Payroll Records		
Payroll Reports	Payroll	6 years after year of creation
Time Sheets	Payroll	6 years after year of creation
Employee benefit applications, waivers and changes	Payroll	Permanent
Payroll deduction authorizations	Payroll	Permanent

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RECORDS	RESPONSIBILITY	RETENTION PERIOD
<i>Payroll Records (cont.)</i>		
Quotations and related correspondence	Principal or Manager	6 years after year of creation
Purchasing contracts	Secretary-Treasurer	6 years after year of creation
Construction contracts	Secretary-Treasurer	6 years after year project completed
Consultant Agreements	Secretary-Treasurer	6 years after year project completed
School Records		
General Files	Principal	one year from date of record
Purchase Orders (school copy)	Principal	1 year after date of purchase
School Bank Account Records	Principal	6 years after date of record
School Based Trust Funds	Principal	6 years after date of record
School scholarships and bursaries	Principal	7 years after award
Teachers' student files	Teacher	1 year after teacher no longer has student (selected records may be transferred to student file)
School Personnel Files	Principal	1 year after teacher leaves the school
School Grievance Files	Principal	Permanent
Student Records		
Student Files	Principal	one year from date student left school
Student Transfer Requests/Responses	Principal	one year from date of transfer

RECORDS	RESPONSIBILITY	RETENTION PERIOD
<i>Student Records (cont.)</i>		
Attendance reports and registers	Principal until year end; then Assistant Superintendent	Permanent
Student Services Files (Includes Psychological Assessments &/or Medical Reports)	Resource Teacher / Principal while student in attendance; then Assistant Superintendent upon graduation or exit from District	7 years after student leaves school or student's 26th birthday (whichever comes last)
Permanent Record Cards	Principal while student in attendance; then Assistant Superintendent	Permanent
PR Card Inclusions – student medical alert and court orders	Principal	7 years after student leaves school or student's 26th birthday (whichever comes last)
Student Transcripts	Principal	Permanent
Provincial scholarships and District Awards	Superintendent	Permanent
Student Information System data	Principal	Permanent
Other student records	Author	Useful life of record
Transportation Records		
Student Bus Passenger Lists	Operations and Maintenance	1 year after year of creation
School Bus Behaviour Reports	Operations and Maintenance	1 year after year of creation
School Bus Video Tapes	Operations and Maintenance	1 year after year of creation
Bus Inspection Reports	Operations and Maintenance	1 year after year of asset disposal
School Bus Maintenance Records	Operations and Maintenance	1 year after year of asset disposal