

## **4660 Retention and Destruction of Records**

Policy 4660

STATUS: ADOPTED

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### *RETENTION AND DESTRUCTION OF RECORDS - FREEDOM OF INFORMATION AND PROTECTION OF PRIVACY ACT*

Adopted and Codified: June 28, 1995

Last Revised: June 14, 2000

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#### Description:

Records held by the Board of Education will be retained while they are of use in the operation of the District and in compliance with 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. Records which contain personal or confidential information should be destroyed in a manner that retains the confidentiality of the records.

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**Description:**

The following retention schedule outlines the minimum amount of time that School District 59 records must be retained and who is responsible for their retention and destruction.

<b>Board Records</b>	
<i>Responsibility: Secretary Treasurer's Office</i>	
Board Policy	Permanent unless repealed or replaced.
Agendas of Regular and Special Board Meetings	Permanent
List of Electors	2 years after the year of creation
Minutes	Permanent
Notice of Meetings	1 year
Oaths and Declaration of Trustees	For term of office
School Trustee list	While current
Debenture and By-law register	Permanent
Debenture and coupons redeemed	6 years after the year redeemed
Contracts with Senior District Staff	6 years after the year employee leaves
Employee WCB forms	6 years after the year employment cease
<b>Communications/Information and Privacy</b>	
<i>Responsibility: Communications Office</i>	
Freedom of Information Request	2 years after the calendar year of creation
Requests to Review Freedom of Information decisions	5 years after investigation, review, inquiry or adjudication is complete and order has been issued
Freedom of Information requests to correct personal information	2 years after the personal information has been updated, annotated, or request has been transferred to another public body
Annual Report as required by the School Act	Permanent
District publications and newsletters	6 years following publication
<b>Facilities Records</b>	
<i>Responsibility: Secretary Treasurer's Office</i>	
Rental of facilities	1 year after the year of rental
Appraisal and inventory records	6 years after the year of asset disposal
Authorization for expenditure of capital funds	6 years after the year capital plan completed

Land titles, deeds and plans	6 years after the year of asset disposal
Mortgages and leases	6 years after expiration of term
Referenda Data (subsequent changes, orders-in-council, etc.)	6 years after the year of asset disposal
Building plans and specifications (with related changes, guarantees, bonds, liens and valuable correspondence)	6 years after the year of asset disposal
<b>Financial Records</b>	
<i>Responsibility: Finance Department</i>	
Annual budget and summary supporting documents	Permanent
Auditor's Reports	Permanent
Cancelled cheques	6 years after the year of creation
Cheque duplicates, invoices, requisitions, purchase orders	6 years after the year of creation
Employee Travel Claims	6 years after the year of creation
Ministry of Education financial information reports	Permanent
General Ledger	Permanent
Invoices billed	6 years after the year of creation
Subsidiary ledgers and journals	6 years after the year of creation
Receipts issued	6 years after the year issued
Bank statement, debit and credit notes	6 years after the year of creation
Deposit books	6 years after the year of creation
Loans, authorization	6 years or term of loan, if longer
Loans, cancelled notes	6 years after the year of creation
Stop payment orders	1 year after the year of creation
<b>General Records</b>	
<i>Responsibility: Each Department Manager or Principal</i>	
General correspondence	2 years after the year of creation
<b>Personnel Records</b>	
<i>Responsibility: Personnel Manager</i>	
Applications and job competitions	1 year after position is filled
Collective Agreements with Unions	Permanent
Contracts with individual employees	6 years after the year employee leaves district
Employee files	6 years after the year employee leaves district
First Aid Certification	6 years after the year employee leaves district
Leave records	6 years after the year employee leaves district
Individual grievance files	Permanent
Letters of discipline	According to collective agreement or 6 years after the year employee leaves the

	district
Personnel File	6 years after the year employment ceases
Reference checks	1 year after position is filled
Seniority Lists	Permanent
Support Staff Subs	1 year
Unsolicited resumes	6 months
Violent incident reports	6 years after the year of creation
<b>Information Systems</b>	
<i>Responsibility: Assistant Secretary Treasurer</i>	
User ID's	When user is removed from the system
System Problem-Tracking	When user is removed from the system
<b>Insurance Records</b>	
<i>Responsibility: Assistant Secretary Treasurer</i>	
Incident Reports	1 year or until finalized
Claims	6 years after claim settled for adults; 2 years after age of majority is reached for individuals under 19 years.
Insurance Policies	Permanent
<b>Payroll Records</b>	
<i>Responsibility: Assistant Secretary Treasurer</i>	
Employee payroll register	6 years after the year employee leaves district
Employee attendance records	6 years after the year employment ceases
Payroll benefits	6 years after the year employment ceases
Payroll deductions	6 years after the year employment ceases
<b>Purchasing Records</b>	
<i>Responsibility: Budget Managers</i>	
Quotations and relative correspondence	6 years after the year of creation
Requisitions and purchase orders	6 years after the year of creation
Purchasing contracts	6 years after the year of creation
<b>Student Records</b>	
Student Information System Data <i>Responsibility: Assistant Superintendent</i>	Permanent
Permanent Record Cards <i>Responsibility: Schools</i>	Permanent
Attendance Reports and Registers <i>Responsibility: Schools</i>	Useful life of the record. Absences are summarized on the permanent record.
Cross Boundary Attendance Requests <i>Responsibility: Director of Instruction</i>	1 year after decision is made about the request
Provincial Scholarships and District Awards <i>Responsibility: Assistant Superintendent</i>	6 years
Senior Secondary School Statement	Permanent

<i>Responsibility: Secondary Schools</i>	
Teachers' student files <i>Responsibility: Teacher (selected records transferred to Primary Student File)</i>	1 year after teacher no longer has student
Other student records <i>Responsibility: Schools</i>	Useful life of the record.
<b>Transportation Data</b>	
<i>Responsibility: Transportation Manager</i>	
Student Bus Registration Forms	1 year after the year of creation
Transportation Assistance Forms	1 year after the year of creation
School Bus Behaviour Report	1 year after the year of creation
School Bus videotapes	1 year after the year of creation