

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

Policy 4660

STATUS: **FOR REVIEW**

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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 they are 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.

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| <b>Board Records</b>                                            |                                                                                                                            |
| <b><i>Responsibility: Secretary Treasurer's Office</i></b>      |                                                                                                                            |
| Board Policy                                                    | Permanent unless repealed or replaced.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                                             | Permanent                                                                                                                  |
| 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                                                                                     |
|                                                                 |                                                                                                                            |
| <b>Communications/Information and Privacy</b>                   |                                                                                                                            |
| <b><i>Responsibility: Chief Privacy Officer</i></b>             |                                                                                                                            |
| Freedom of Information Request                                  | 2 years after the calendar year of creation                                                                                |
| Requests to Review Freedom of Information decisions             | 6 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                                                                                              |
| Focus on Learning                                               | Permanent                                                                                                                  |
|                                                                 |                                                                                                                            |
| <b>Facilities Records</b>                                       |                                                                                                                            |
| <b><i>Responsibility: Secretary Treasurer's Office</i></b>      |                                                                                                                            |
| Rental of facilities                                            | 1 year after the year of rental                                                                                            |
| Appraisal and inventory records                                 | Permanent                                                                                                                  |

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| Authorization for expenditure of capital funds                                                                 | 6 years after the year capital plan completed   |
| Land titles, deeds and plans                                                                                   | Permanent                                       |
| Mortgages and leases                                                                                           | Permanent                                       |
| 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><br><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><br><i>Responsibility: Each Department Manager or Principal</i>                          |                                                 |
| General correspondence                                                                                         | 2 years after the year of creation              |
| <b>Personnel Records</b><br><i>Responsibility: Director of Human Resources</i>                                 |                                                 |
| Applications and job competitions                                                                              | Permanent                                       |
| Collective Agreements with Unions                                                                              | Permanent                                       |
| Contracts with individual employees                                                                            | 6 years after the year employee leaves district |
| Criminal Record Checks                                                                                         | Permanent                                       |
| Employee files                                                                                                 | 6 years after the year employee leaves district |
| Employee WCB Forms                                                                                             | Permanent                                       |
| Employment History                                                                                             | Permanent                                       |
| Pension Enrollment Contributions                                                                               | Permanent                                       |
| Life Insurance Forms and Waivers                                                                               | Permanent                                       |
| Letter of Permission paperwork                                                                                 | Permanent                                       |

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| 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                                                                         |
| Practicum Placements/Agreements                                                | Permanent                                                                                                        |
| Reference checks                                                               | 1 year after position is filled                                                                                  |
| Seniority Lists                                                                | Permanent                                                                                                        |
| Support Staff Subs                                                             | 1 year                                                                                                           |
| Third Party Contracts                                                          | Permanent                                                                                                        |
| Unsolicited resumes                                                            | 6 months                                                                                                         |
| Violent incident reports                                                       | 6 years after the year of creation                                                                               |
| Volunteer Information                                                          | Permanent                                                                                                        |
| <b>Information Systems</b><br><i>Responsibility: Technology Manager</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><br><i>Responsibility: Director of Human Resources</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><br><i>Responsibility: Finance Manager</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><br><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                                                                               |
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| <b>Student Records</b>                                                                                           |                                                                             |
| Student Information System Data<br><i>Responsibility: Assistant Superintendent</i>                               | Permanent                                                                   |
| Permanent Record Cards<br><i>Responsibility: Schools</i>                                                         | Permanent                                                                   |
| Attendance Reports and Registers<br><i>Responsibility: Schools</i>                                               | Useful life of the record. Absences are summarized on the permanent record. |
| Cross Boundary Attendance Requests<br><i>Responsibility: Director of Instruction</i>                             | 1 year after decision is made about the request                             |
| Provincial Scholarships and District Awards<br><i>Responsibility: Assistant Superintendent</i>                   | 6 years                                                                     |
| Senior Secondary School Statement<br><i>Responsibility: Secondary Schools</i>                                    | Permanent                                                                   |
| Teachers' student files<br><i>Responsibility: Teacher (selected records transferred to Primary Student File)</i> | 1 year after teacher no longer has student                                  |
| Other student records<br><i>Responsibility: Schools: Yearbooks</i>                                               | Useful life of the record.                                                  |
| <b>Transportation Data</b><br><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                                           |