



Title: **RECORDS MANAGEMENT AND RETENTION**

Adopted: January 2018

Revised:

Reviewed: February 2022

Authorization: Education Act of Ontario
Canada Evidence Act
Municipal Freedom of Information and Protection of Privacy Act
Personal Health Information Protection Act
Income Tax Act
Employment Insurance Act
Canada Pension Plan
Employment Standards Act
Pension Benefits Act
Workplace Safety and Insurance Act
Occupational Health and Safety Act
Ministry of Education OSR Guideline 2000
Ministry of Education Policy and Program Memoranda

POLICY

It is the policy of the Bloorview School Authority that a standardized Records and Information Management procedure be maintained in order to safeguard the assets of the Board and ensure efficiency in the creation, maintenance, retrieval, storage and disposition of all records and information.

It is the policy of the Board that the personal information under its control be protected and that the management of records and information within its care and custody be supported in a disciplined, coordinated and strategic manner.

BACKGROUND

1. Recorded information for the purpose of this procedure includes, but is not limited to, the information contained in any record such as:
 - *Legal* - Board minutes, correspondence, memoranda, reports, student records, drawings, microform records (microfilm, microfiche), electronic and all other ma-

chine-readable records, any record produced by means of computer hardware and software.

- *Historical* - books, journals or published reports which are, or will, form part of catalogued library of holdings, publications/brochures, forms, plans/maps, photographs/films, sound recordings/videotapes, pictorial/graphic works.
 - *Administrative* - duplicate records preserved within the same medium of storage and retained solely for convenience, reference or future dissemination.
2. "Record" means any information in printed form, on film, by electronic means or otherwise, and includes:
 - a) correspondence, a memorandum, a book, a plan, a map, a drawing, a diagram, a pictorial, or graphic work, a photograph, a film, a microfilm, a sound recording, a videotape, a machine-readable record, any other documentary material, regardless of physical form or characteristics, and any copy thereof, and
 - b) any record that is capable of being produced from a machine-readable record under the control of an institution by means of computer hardware and software or any other information storage equipment and technical expertise normally used by the institution.
 3. Transitory records are records that hold no further value to the school board beyond an immediate or minor transaction, or records that may be required only for a very short time, perhaps until they are made obsolete by an updated version of the record, or by a subsequent transaction or decision. Examples of transitory records include notices of meetings, routine notices or memos regarding holidays or special events circulated to all staff or posted in public folders; insignificant or inconsequential information items concerning routine administrative or operational matters, daily student work/assignments, and personal messages and information.

GUIDING PRINCIPLES

1. The Bloorview School Authority is committed to maintaining an authentic and reliable record of Board actions, transactions and decisions through a coordinated and integrated approach to records and information management. These assets are valuable as evidence of Board functions and activities.
2. The Board is committed to the appropriate collection, use, retention and disclosure of personal information in compliance with all applicable provisions in the *Education Act*, the *Municipal Freedom of Information and Protection of Privacy Act*, the *Personal Health Information Protection Act*, the *Personal Information and Protection of Electronic Documents Act* and other relevant statutes and regulations of the Province of Ontario and the Government of Canada. (See Appendix A).
3. All records and information received, created, and maintained within administrative departments and schools support the Board's day-to-day-operations. As such, they are the property of the Board and subject to this policy.

4. Confidential records and those containing personal information must be treated as such when storing, maintaining, transferring or destroying them. They are to be destroyed in such a manner that they cannot be read, interpreted or reconstructed in accordance with the provisions of the *Municipal Freedom of Information and Protection of Privacy Act*.
5. This policy applies to:
 - All records within the custody or under the control of the Board and addresses all aspects of Board operations and all records made or received in the day-to-day business operations of the school or Board regardless of the medium in which those records are stored and maintained. It ensures that records are available as evidence of Board functions and activities and supports operating requirements.
 - All business applications and information technology systems used to create, store, and manage records and information including email, database applications, and websites.
 - All Board staff and to third party contractors or agents who collect or receive records and information on behalf of the Board. All staff shall be responsible and accountable for creating, maintaining accurate business records within their control.
6. Recorded information is a vital public resource to be managed effectively to ensure its continued availability, integrity, preservation and security from its initial creation or acquisition to its final disposition, following appropriately defined cycles of retention and disposal.
7. Personal information collected and student records must be retained for the minimum periods required by law.
8. Although these procedures have been designed to specifically address the establishment of a records management system, special consideration is also given to those records identified in the Board's Retention schedule as having archival value.

These records, although no longer required for daily administrative purposes, contain information which is of value for both long- term use and for historical reference. The archival program will effectively store records which are to be kept permanently once the original operational need for the record has ceased to ensure that valuable documents are not destroyed.

The following list provides general information on the types of records which should be maintained as archival for historical reference:

- Minutes of Official Meetings of the Board of Trustees;
 - Board Reports;
 - Yearbooks;
 - Architectural Plans/Engineering Drawings;
 - In-House Publications
 - Legal Documents
9. Timely disposal must be ensured for recorded information that has been identified as not having archival value.

10. The willful destruction, alteration, deletion, removal from the custody or control of the Board, concealment or private use of Board records and information is prohibited by this policy unless done so in accordance with the Board's approved records and information management retention schedule.
11. Where practical and possible, information technology shall support the procedures of records and information management.
12. The Board shall specify the purposes for which personal information is collected, used, retained and disclosed, and for notifying individuals at or before the time the information is collected.
13. The collection of personal information must be fair, lawful and limited to that which is necessary to the specified purpose. Personal information shall be collected only when it is necessary for providing for the education of students, the employment of staff, or as required and authorized by law.
14. An individual has the right to access his/her personal information and will be given access to that information, subject to any restrictions. An individual has the right to challenge the accuracy and completeness of the information and request that it be amended as appropriate, or to have a letter/statement of disagreement retained on file. Any individual to whom the disclosure has been granted in the year preceding a correction has the right to be notified of the correction/statement. An individual is to be advised of any third-party service provider requests for his/her personal information in accordance with privacy legislation.
15. A records management program facilitates:
 - Timely, relevant, and accurate management of information to support the provision of programs and services that best meet students' needs;
 - Informed decision-making and policy development, and effective, efficient, and trustworthy program and service delivery;
 - Transparency and accountability;
 - Access to and privacy of information in accordance with legislation and policies;
 - Recording and management of business decisions and transactions that preserve corporate memory; and
 - Access to information for legal purposes

PROCEDURES

1. Electronic files cover a broad range of data and include any named grouping of data such as word processing files, email, directories, spreadsheets, databases or any official electronic board documents. An example of these may include, but is not limited to: Board minutes, correspondence, memoranda, reports, student records, journals or published reports which are, or will, form part of a catalogued library of holdings, publica-

tions/brochures, forms, plans/maps, photographs/films, sound recordings/videotapes, pictorial/graphic works, and newsletters. The same issues apply for storage and retention of machine-readable records as when dealing with paper documents. They are governed by the statutes that apply to the access, retention, and destruction of all public records and personal information held by public institutions.

2. A Vital Records Plan will be developed to identify and protect those records that are vital to getting the system up and running immediately after a disaster, e.g., water damage, fire. It will include a pre-arranged set of scenarios for dealing with system records and back-up copies of vital records. Once identified and duplicated, the record copies are to be kept in a separate and safe location as determined by the Supervisory Officer. The location of all back-up material will be reported to and maintained by the HR Manager.
3. For access and privacy purposes, there should be only one complete official retention copy of each record. Back-up copies should be prepared only when there is sufficient need for authenticity of the original record, when they are considered vital records and to provide ease of access.
4. All records which are currently inactive must be retained for longer periods of time, as defined by the Records Retention Schedule.
5. Records (including electronic and other viable media records) should be reviewed regularly for disposal and in accordance with the Board's Retention Schedule. This includes all relative back-up tapes and hard drives.
6. Duplicate records and temporary working papers such as rough notes or informal drafts are to be destroyed at the time the official records are destroyed as they should not outlive the documents that resulted from them.
7. Records which include confidential/personal information or are of a sensitive nature are to be destroyed by shredding or by a means to render the information illegible.
8. Most electronic/voice mail and telephone transitory messages are considered short term records and should be disposed of as soon as their purpose has been served. However, if the content of the message or any attachments are considered business records, they fall under the Retention Schedule.
9. The need to maintain electronic records should also be taken into consideration when upgrading software or hardware throughout the system. Electronic files, particularly those designated as permanent records, must be migrated onto the new technology and stored in a stable environment.
10. The Records Retention Schedule (Appendix B) outlines retention of the Board's records according to their administrative, fiscal, legal, and research/archival value. It includes records that must be retained according to legislation and/or Board procedures and a notation of the archival/historic importance of each record series where appropriate.
11. The following is the process for destroying Board/school records:
 - Staff refer to the approved retention schedule for time lines

- The principal shall review the list of documents recommended for disposal
 - The Supervisory Officer shall approve documents for disposal or require documents to be maintained as appropriate.
 - Once approval has been granted, the record can be destroyed;
 - The Retention Schedule must be amended and approved to dispose of a record which is not listed.
12. If there is a potential lawsuit, investigation or pending audit, related documents will become permanent records.
 13. Records should be reviewed yearly for disposal including electronic and other viable media records, and in accordance with the Board's Retention Schedule. This includes all relevant back-up tapes and hard drives.
 14. Transitory records may be destroyed after their use has been served, e.g., in the case of student work, once a mark or indication of mastery has been made.

RECORDS RETENTION SCHEDULE

1. The Records Retention Schedule (Appendix B) outlines retention of the Board's records according to their administrative, fiscal, legal, and research/archival value. It includes records that must be retained according to legislation and/or Board procedures and a notation of the archival/historic importance or vital status of each record series, where appropriate.
2. All recorded information must be identified in a retention schedule and must not be destroyed or removed from the control or custody of the Board except as authorized in the schedule.
3. The HR MANAGER shall:
 - Generate and maintain documentation to support records and information management including, but not limited to, classification schema, records inventories, schedules of retention periods and disposition schedules;
 - Oversee the management of inactive records storage;
 - Oversee the management of expired records destruction;
 - Oversee the application of legal holds to records and information, as required;
 - Oversee the management of records storage, ensure that records are properly stored.
4. Staff members shall maintain all records and information in a secure, reliable and trustworthy manner for current and future access.

APPENDIX B - RETENTION SCHEDULE

DOCUMENT DESCRIPTION	CODE	YEARS FILES KEPT	TYPE OF DISPOSAL	NOTES
Accident Reports	L08	Perm		
Accounts Payable	F01	8	Shred	
Accounts Receivable	F18	7	Shred	
Acts/Regulations	L12			Current until superceded
Admittance/Demits/Transfers/Exits (Student)	S06	Perm		subject to OSR Guidelines - Permanent/55 years after course completion
Affidavits/Claims/Litigation	L10	10	Shred	Confirm with legal counsel if appropriate to shred
Agreements/Contracts	L02	20	Shred	Recommend storage 20 years following expiry date
Allegations/Investigations	L13	Perm		
Appeals/Hearings	L05	Perm		
Applications/Registrations (Students)	S07	5		subject to OSR Guidelines - Permanent/55 years after course completion
Appointments to Board and Committee	G08	Perm		
Arbitrations/Grievances	H14	20		
Archives General	A06	Perm		
Assessments/Taxation	F23	7	Shred	
Associations/Organizations	A01	4	Purge	
Attendance (Employee)	H02	20	shred	
Audited Financial Statements	F02	8	Shred	
Audits	F02	7	Shred	
Scholarships/Bursaries (Students)	S28	Perm	or Shred	keep winners submission permanently; maintain list of other applicants
Awards/Recognition (Staff)	P07	3	Shred	if part of employee file Perm; 55 years otherwise shred
Banking	F04	7	Shred	
Benefits – plans, contracts	H06	5	Shred	Until superceded
Benefits – employee information	H06	Perm		55 years after termination/retirement
Bequests/Donations (School)	F19	7	Shred	
Board Agenda and Minutes	G03	Perm		
Bonds/Debentures	F22	7	Shred	recommend storage 6 years after expiry/termination
Budgets	F07	7	Shred	
Building Improvements	B10	All	Perm	
By-Laws	G01		Perm	until superceded
Cancelled Cheques	F04	7	Shred	Based on Audit Requirements that extend to 7 years
Car Allowances	F08	7	Shred	based on Audit Requirements that extend to 7 years

DOCUMENT DESCRIPTION	CODE	YEARS FILES KEPT	TYPE OF DISPOSAL	NOTES
Charities/Fundraising	A14	7	Shred	meets audit requirements
Child Abuse/Child Welfare	S23		Perm/Shred	* cases of suspected child abuse kept permanently; other purged 10 years after graduation age
Child Care	E23			until superceded
Claims/Litigation/ Affidavits	L10	10	Shred	Confirm with legal counsel if appropriate to shred
Classroom Allocation	B01	Perm		
Code of Behaviour (School)	E32			until superceded
Collective Agreements	H12	Perm		
Community Education/Liaison	E21		Purge	
Community/Parents Research	R07	7	Shred	recommend 7 years following completion
Complaints	P08		Shred	
Computer/Information Systems	I01			current until superceded
Conferences/Conventions/Seminars	H22		Purge	
Contacts/Mailing Lists	P03		Shred	
Contracts/Agreements	L02	20	Shred	Recommend storage 20 years following expiry date
Criminal Background Checks	L12	Perm	Shred	In employees file – 55 years
OSRs (Ontario Student Records)	S01			subject to OSR Guidelines
Curriculum Guidelines	E01			until superceded as directed by latest Ministry Review/Guidelines
Curriculum Planning	E03			current Ministry Review + 2
Curriculum Projects	E03			current Ministry Review + 2
Deposits	F04	8	Shred	Based on Audit Requirements that extend to 7 years
Directories - Telephone	P03		Shred	
Dispatch - Systems	I05			until superceded/replaced
Donations/Bequests (School)	F19	7	Shred	
Education Week	E21		Purge	
E-mail	I02			subject matter may determine legal requirement
Emergencies/School Incidents	P11	Perm	Shred	
Employee and Trustee Expenses	F08	7	Shred	to meet audit requirements
Employee Assistance Program	H06			
Employee Attendance	H02	20	shred	
Employee Files / Records	H01	Perm		subject to Personnel file guidelines (55 years following

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Purge = Discard redundant files
TTL = = Total (of On and Off Site storage time)

DOCUMENT DESCRIPTION	CODE	YEARS FILES KEPT	TYPE OF DISPOSAL	NOTES
				dismissal/retirement/resignation)
Employment Equity	H19	All	Perm	
Enrolment	R01		Perm	Electronic Storage
Equipment, School and Office	A05		Perm	until obsolete/replaced
Eternal Audits	F02	7	Shred	
Ethnic/Racial Harassment	H26	6	Shred	
Events	P06		Purge	
Excursions (Field Trips)	E05	3	Purge	
Expulsions/Exclusions/Suspensions	S30		Shred	Kept in OSR, per OSR guidelines
External Research	R12	7	Shred	
Financial Statements	F09	7	Perm	
Financial Working Papers	F03	7	Shred	
Fire Drills	B16	3	Shred	
Fixed Assets	F28	Perm	Shred	2 years following disposal
Floor Plans	B08	Perm		
Freedom of Information	A07	3		recommend 2 years following resolution
Fundraising	A14	7	Shred	meets audit requirements
General Ledger	F12	All	Perm	meets audit requirements
Grant/Subsidies	F10	7	Shred	
Grievances/Arbitrations	H14			current until resolution - fwd to Legal Services
GST / PST	F20	7	Shred	meets audit requirements
Hearings/Appeals	L05	20	Shred	
Human Rights Claims	L14	6	Shred	
Identification Placement and Review Committee (IPRC)	S19	30	Shred	
Information Systems/Computer	I01			current until superceded
Inspections (Workplace)	B16	All	Perm	
Insurance	L07	All	Perm	
Internal Audits	F02	7	Shred	opportunity to audit remains for 7 years
Internet Systems	I03			until superceded
Interpretation/Translation Services	A19			until superceded

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DOCUMENT DESCRIPTION	CODE	YEARS FILES KEPT	TYPE OF DISPOSAL	NOTES
Inventory Cards/Control	A04	7	Purge	offsite reflects lists of equipment deemed obsolete/discarded unable to repair
Investigations/Allegations	L13		Perm	
Investments	F05	7	Shred	recommend minimum 6 years following termination/expiry
Job Descriptions	H09	4		maintain on shared drive in active and inactive files
Journal Entries	F11	7	Perm	meets audit requirements
Keys - Security	B13			until superceded
Labour Certification	H13		Perm	until superceded
Labour Union Certification	H13		Perm	until superceded
Learning Materials	E04			until superceded
Leaves of Absence/Secondments	H04			55 years in employee file
Legal Opinions	L06	All	Perm	until superceded
Lesson Plans	E04	4	Purge	
Library and Learning Materials Selection	E01			until superceded
Licence Plate Lists	A16			until superceded
Litigation/Affidavits/Claims	L10	10	Shred	ONLY Legal Services staff can determine if file/documents can be shredded.
Lunch Programs	E23			until superceded
Mail Services	A10		Purge	
Mailing Lists/Contacts	P03		Shred	
Maintenance Requests	B04		Perm	Electronic Storage
Memberships	A01	4	Purge	
Memorabilia	P10	Perm		
Memorials	A21		Purge	
Mileage	F08	7	Shred	
Ministry Guidelines	G07		Perm	until superceded
Ministry Reports	R03		Perm	Refers to Legacy documents (paper); electronic storage
Municipal Freedom of Information Act - Requests	A07	3		recommend 2 years following resolution
Negotiations	H15	Perm		
Newsletters	P04			

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DOCUMENT DESCRIPTION	CODE	YEARS FILES KEPT	TYPE OF DISPOSAL	NOTES
Obituaries	A21		Purge	In OSR or Employee File
Occasional Teacher Lists	H10			until superceded
Occupational Health and Safety	B14	7	Perm	
Office Index Cards/Student Master Records	S03		Perm	subject to OSR guidelines
Ontario Student Records (OSR) - Current	S01			subject to OSR guidelines
Ontario Student Records (OSR) - Retired Pupils	S02			subject to OSR guidelines
Operational Equipment	B03	3		until obsolete/replaced
Operations	B05			until replaced/upgraded
Organization	G09	All	Perm	
Organizational Charts (Administrative)	G09	5	Shred	Reflects departments only - If related to Governance, records would be Permanent
Organizations/Associations	A01	4	Purge	
Orientation - Staff	H21		Purge	until superceded
Packing Slips	A04		Purge	
Parent Councils (School Councils	E28	4	Purge	
Parents/Community Research	R07	7	Shred	recommend 7 years following completion
Parking	A16			until superceded
Partnerships – Administration	A24	7	Purge	
Payroll	F14	10	Shred	until superceded
Payroll (Timecards)	F14	All	Perm	Central ONLY - subject to Personnel file guidelines (55 years following dismissal/resignation/retirement)
Pension Contribution/Support	F25	All	Perm	subject to Personnel file guidelines (55 years following dismissal/resignation/retirement)
Pension/Superannuation	H07	All	Perm	subject to personnel file guidelines (55 years following dismissal/resignation/retirement)
Permanent Improvements - Capital Projects	B09	All	Perm	
Permanent Record Cards	S03			subject to OSR guidelines
Petty Cash	F06	7	Shred	

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DOCUMENT DESCRIPTION	CODE	YEARS FILES KEPT	TYPE OF DISPOSAL	NOTES
Photographs	P09		Storage	
Physical Harassment	H24	6	Shred	
Physiotherapy / Occupational (therapy)	S32		Perm	* cases of suspected child abuse kept permanently; other purged 10 years after graduation age
Placements/Promotions/Transfers (Staff)	H11	All	Perm	subject to personnel file guidelines (55 years following dismissal/resignation/retirement)
Playground/Playscape - Safety	B14	7	Perm	
Playground/Playscapes - Equipment	A05		Perm	until obsolete/replaced
Police (security)	B13			until superceded
Police Matters	L11			recommend 2 years following resolution
Policies/Procedures	G02	All	Perm	until superceded
Pool Operations	B05			until replaced/upgraded
Practice Teaching	H18	5	Shred	
Printing/Duplicating Services	A11		Purge	
Professional Development (Staff)	H21		Purge	until superceded
Program Research/Curriculum	R10	6	Shred	recommend current plus 5
Programs and Projects – Administration (Special)	A23	7	Purge	
Programs Outside the Classroom	E05	4	Purge	
Projects and Programs – Administration (Special)	A23	7	Purge	
Promissory Notes	F05	7	Shred	minimum 6 years following termination/expiry
Promotions/Transfers/Placements (Staff)	H11	All	Perm	subject to personnel file guidelines (55 years following dismissal/resignation/retirement)
Property Damage Reports	L09	All	Perm	
Protective Equipment Use (Hazardous Materials/Hazardous Waste)	B17			until superceded
Provincial Grants	F10	7	Perm	subject to Microfiche
PST / GST	F20	7	Shred	meets audit requirements
Psychological Assessments (Student)	S16		Perm/Shred	* cases of suspected child abuse kept permanently; other purged 10 years after graduation age

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DOCUMENT DESCRIPTION	CODE	YEARS FILES KEPT	TYPE OF DISPOSAL	NOTES
Pupil Records (OSR)	S01			subject to OSR guidelines
Purchase Orders	F15	7	Shred	
Purchase Requisitions	F16	7	Shred	
Quarantines	B14	7	Perm	
Quotations/Tenders	F17	7	Shred	
Racial/Ethnic Harassment	H26	6	Shred	
Radon Exposure (Hazardous Materials/Hazardous Waste)	B17	7	Perm	
Recognition/Awards/Bursaries (Students)	S28		Perm or Shred	subject to OSR Guidelines - Permanent/55 years
Recognition/Commendations/Awards (Staff)	P07	3	Shred	if part of employee file Perm; 55 years otherwise shred/purge 2 years following dismissal/resignation/retirement
Reconciliations - Banking	F04	7	Shred	Based on Audit Requirements that extend to 7 years
Recorded Information Management	A06			until superceded
Records (Students OSR)	S01			subject to OSR Guidelines
Records Disposition	A09		Purge	
Recruitment (External)	H16	2	Shred	subject to inclusion in employee files if they are hired
Recycling Programs	B17			until superceded
Reference Materials Selection	E01			until superceded as directed by latest Ministry Review/Guidelines
Registrations/Applications (Students)	S07	5		subject to OSR Guidelines - Permanent/55 years after course completion
Regulations/Acts	L12	All	Perm	until superceded
Renovations (Buildings)	B10	All	Perm	
Revenue - Grants/Subsidies	F10	7	Perm	subject to Microfiche
Revenue/Resource Generation (HRDC)	F29	8	Shred	
Reviews and Evaluations (schools, departments, program)	A22			until superceded
Safe Arrival Program	E24	2	Shred	
Safe Schools (Issues)	E32	7	Shred	
Safe Schools Programs	E33			until superceded
Safety and Health Awareness - Schools	E24			until superceded
Salary Administration	H05	All	Perm	maintained on HRIS indefinitely
Schedules/Timetables (Student)	E07	3	Purge	

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DOCUMENT DESCRIPTION	CODE	YEARS FILES KEPT	TYPE OF DISPOSAL	NOTES
School Code of Behaviour	E32			until superceded
School Councils	E28	4	Purge	
School Drawings and Plans	B08	All	Perm	
School Incidents/Emergencies	P11	7	Shred	
School Safety Patrols	E24			until superceded
School Year Calendar	E07			until superceded
School/Site Lockdowns	B19	All	Perm	subject to legal requirements
Secondments/Leaves of Absence	H04	*	*	maintained on HRIS indefinitely; copy in personnel file
Section 23 Schools - Administration	A12			until superceded
Security	B13			until superceded
Seminars/Conferences/Conventions	H21		Purge	until superceded
Seniority Lists	H12	5	Shred	
Signage	B05			as per code requirements/until superceded
SIS (Student Information System)	I06		Purge	until obsolete/replaced
Social Work	S17		Perm/Shred	* cases of suspected child abuse kept permanently; other purged 10 years after graduation age
Space Utilization	B01		Perm	until superceded
Special Projects - Curriculum	E27	3		until superceded
Special Projects and Program s-Administration	A23	7	Purge	
Speech – Language Pathology	S18		Perm/Shred	* cases of suspected child abuse kept permanently; other purged 10 years after graduation age
Speeches	P02	4	Purge	
Staff Allocation/Staff Lists	H10	5		Staff Allocation will be kept electronically
Staff Committees	A02	5	Shred	
Staff Development	H21		Purge	until superceded
Staff Lists/Staff Allocation	H10	5		Staff Allocation will be kept electronically
Staff Mobility (Succession Planning)	H08	5		
Staff Research	R09	5	Shred	
Standardized Testing (I.e. EQAO)	S12		Perm	
Strategic Planning	R02	5	Shred	

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DOCUMENT DESCRIPTION	CODE	YEARS FILES KEPT	TYPE OF DISPOSAL	NOTES
Strikes	H15	All	Perm	
Student Assessment - Immigrant	S14		Perm	
Student Attendance Registers	S04		Shred	
Student Bus Routes	S27		Purge	
Student Demographics	R04		Perm	
Student Evaluation Research	R11	5	Shred	
Student Examinations	S12			subject to Ministry Guidelines
Student Harassment	S26		Perm	may be subject to OSR Guidelines
Student Health	S24			
Student Information System (SIS)	I06		Purge	until obsolete/replaced
Student Lists/Student Report Lists	S08		Shred	
Student Marks Register	S05	All	Perm	55 years following demission
Student Master Records/Office Index Cards	S03		Perm	
Student Report Lists/Student Lists	S08		Shred	
Subsidiary Ledgers, Registers, Journals	F13	7	Perm	meets audit requirements
Substance Abuse	E24			until superceded
Substances Control Exposure (Hazardous Materials/Hazardous Waste)	B17	7	Perm	
Succession Planning	H08	5		
Suppliers/Vendors/Caterers	A15		Purge	
Supply Teacher Lists (Occasional Teachers)	H10			until superceded
Surveillance Reports	B13			until superceded
Suspensions/Expulsions/Exclusions	S30	7	Shred	
Taxation/Assessments	F23	7	Shred	based on Audit Requirements that extend to 7 years
Taxes	F20	All	Perm	
Teaching Units/Curriculum Ideas	E04			until superceded
Telephone / Communications Systems	I08		Perm	until obsolete/replaced
Telephone Directories	P03		Shred	
Telephone Equipment Requests	A05		Purge	

LEGEND

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Purge = Discard redundant files
TTL = = Total (of On and Off Site storage time)

DOCUMENT DESCRIPTION	CODE	YEARS FILES KEPT	TYPE OF DISPOSAL	NOTES
Templates	A08			until superceded
Temporary Employment	H18	5	Shred	subject Personnel file guidelines (55 years following dismissal/resignation/retirement)
Tenders/Quotations	F17	7	Shred	
Tenders/Quotations - Unsuccessful	F17		Shred	For Freedom of Information Requests
Textbook Selection	E01			until superceded by Ministry Review/Guidelines
Timecards (Payroll)	F14	All	Perm	Central ONLY - subject to Personnel file guidelines (55 years following dismissal/resignation/retirement)
Timetables/Schedules (Student)	E07	3	Purge	
Tragic Events	P11	7	Shred	
Transcripts - Student	S01		Perm	subject to OSR guidelines
Transfers/Exits/Admittance/Demits (Student)	S06	5	Perm	subject to OSR Guidelines - Permanent/55 years after course completion
Transfers/Placements/Promotions (Staff)	H11	All	Perm	subject to personnel file guidelines (55 years following dismissal/resignation/retirement)
Transition Years materials	E16		Purge	
Translation/Interpretation Services	A19			until superceded
Transportation	F21	4		until superceded
Trust Funds (Scholarship Funds/Bequests/Donations)	F19		Perm	minimum 6 years following termination/expiry
Trustee Committee Agendas	G06	All	Perm	
Trustee Committee Minutes	G06	All	Perm	
Trustee Register	G10		Perm	subject to storage
Trustees	G11		Perm	subject to storage
Uniforms	A13			until superceded
United Way Fundraising	A14	7	Shred	meets audit requirements
Universities	E18		Purge	
Unsolicited Resumes	H17	0	Shred	
Vacations	H03			maintained on HRIS indefinitely
Vendors/Caterers/Suppliers	A15		Purge	
Video Surveillance	B13			until superceded

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DOCUMENT DESCRIPTION	CODE	YEARS FILES KEPT	TYPE OF DISPOSAL	NOTES
Violence Prevention	E32	7	Shred	
Volunteer Development	E26			until superceded
Waste Diversion Programs	B17			until superceded
WHMIS	B17			until superceded
Work Orders (Maintenance) (all records are electronic – SAP)	B04		Perm	Electronic Storage
Workers Compensation	H05	All	Perm	subject to Personnel file guidelines(55 years following dismissal/resignation/retirement)
Workplace Harassment	H25	6	Shred	
Workplace Inspections	B16	All	Perm	
Workplace Safety and Insurance Board (WSIB)	H05	All	Perm	subject to Personnel file guidelines (55 years following dismissal/resignation/retirement)

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