

SCHEDULE OF RETENTION PERIODS

Electronic data will be considered hard copy for the purposes of this procedure. For records to be maintained for an indefinite period, hard copy will be the only medium available.

1. Board Records

<u>Subject</u>	<u>Minimum Retention Period</u>
Annual Report	Indefinite
Board policy	Indefinite
Committee reports	Indefinite
Minutes	Indefinite
Notice of meeting and agenda	5 years
Oaths and declarations of Trustees	For term of office

2. Financial Records

<u>Accounting: (District Office)</u>	<u>Minimum Retention Period</u>
Accounts payable and receivable	6 years
Annual budget and supporting documents	Indefinite
Auditor's reports	Indefinite
Cancelled cheques	6 years
Cheque duplicates	2 years
Debenture and bylaw register	Indefinite
Debenture and coupons redeemed resolution required prior to destruction)	3 years after audit
Financial and statistical statements	Indefinite
Ledgers, synoptics, subsidiary ledgers, journals	Indefinite
Purchase orders and invoices	7 years
Quotations and relative correspondence	1 year
Receipts issued	6 years

3. Banking

<u>District Office and School</u>	<u>Minimum Retention Period</u>
Bank statements	6 years
Deposit books	6 years
Loans – authorization of cancelled notes	1 year or term of loan 6 years
Stop orders	1 year

4. Personnel/Payroll: (District Office)

Subject

All records and data relating to any employee (application, appointment, TD1, etc. – any records)

Applications and job competitions
Complaints or investigations of personnel

Payroll sheets
Records of payroll remittances (garnishees, superann., UIC, Inc. Tax)

Salary agreements
Timecards
TD-4 and Summary
W.C.B. Claims

Minimum Retention Period

Indefinite

1 year after position ~~ed~~
Indefinite or as per personnel collective agreement

Indefinite
3 years

Indefinite
3 years
3 years
Indefinite

5. Buildings and Property: (District Office)

Subject

Appraisal and inventory records
Authorization for expenditure of capital funds
building plans and specifications (with related changes, guarantees, bonds, liens and valuable correspondence)

Land titles, deeds and plans
Records of payroll remittances (garnishees, superann., UIC, Inc. Tax)

Mortgages and leases
Capital expenditure plans, OICs

Minimum Retention Period

Indefinite
Indefinite
Indefinite

Indefinite
3 years

1 year after expiration of term
10 years

6. General Administration: (District Office)

Subject

Administrative circulars
Complaints or allegations with possible future repercussions

FIPPA requests
FIPPA requests to review decisions

General correspondence (not departmental)
Insurance – accident reports
Insurance – claims
Insurance – policies
Manual of the school law and regulations
Transportation data

Minimum Retention Period

While in effect
5 years

3 years
5 years after review or adjudication complete

2 years
1 year or until finalized
Indefinite
While in effect
While in effect
While applicable

7. School Records

Subject

Permanent student records

Other student records

Minimum Retention Period

55 years from the date the student withdraws or graduates from school
Refer to Administrative Procedure 320 – Student Records

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

Approved: August 15, 2021
Revised: