

Appendix A - RECORDS RETENTION SCHEDULE

| Record Series | Record No. | Record Type | Record Type Scope (Description) | Responsible Department | Record Format | Retention | Retention Event Trigger | Retention Value & Legal Citation | PIB | Information Classification | Action to Record after Retention? | Record Location |
|--|------------|--|--|------------------------|-----------------------|-----------------------|------------------------------|---|-----|----------------------------|-----------------------------------|--------------------------------|
| Administrative Management: The function of overseeing the administration of teams and units within the Board and schools. Records supporting this function relate to administrative committees' decisions and meetings, and internal administrative support or services. | AM-01 | Associations/ Organizations | Includes reports, newsletters, publications, conference and workshop information and proceedings from organizations to which staff belong. | Originating Department | Electronic, Hard Copy | Transitory | | Operational Value | | Public | Destroy | Personal Work Files |
| | AM-02 | Committees – Internal & External | Includes records of committees and councils on which staff members participate as members. Records include meeting minutes, notices, reports, recommendations and supporting documentation. Excludes: Committees – General School Council SEE: CG-06, CG-10 | Originating Department | Electronic, Hard Copy | Event Date + 03 years | Committee is dissolved | Operational Value | | Public | Destroy | Records Centre, Central Filing |
| | AM-03 | Form Inventory | Includes records regarding masters/originals of blank hard copy and electronic forms history used by the jurisdiction. | Originating Department | Electronic, Hard Copy | Event Date + 02 years | Until obsolete or superseded | Operational Value | | Internal | Archives | Records Centre, Central Filing |
| | AM-04-01 | Meetings – Internal | Records include agendas, minutes, reports and resolutions from meetings involving staff. Excludes: Governance Committees (i.e., Admin, Council, and Exec. Council, etc.) SEE: Corporate Governance | Originating Department | Electronic, Hard Copy | Event Date + 03 years | August 31 | Operational Value | | Internal | Archives | Records Centre, Central Filing |
| | AM-04-02 | Meetings – Senior Management | Includes records regarding Senior Management Team Meetings, such as the Chief Superintendent, Directors, Principals, and Assistant Principals. Includes minutes, agendas, records of decision, terms of reference, and supporting documents. Excludes Governance Committees SEE: CG-05 Committees of the Board, CG-06 – Committees – General | Originating Department | Electronic, Hard Copy | Event Date + 03 years | August 31 | Operational Value, Not Specified 183, 222 | | Internal | Archives | Records Centre, Central Filing |
| | AM-05 | Services Requisitions and Reports: Internal Services | Includes records relating to translation, audiovisual services, duplicating/ printing services and mail/courier services, requisitions and memos for services, confirmations and service logs/reports, correspondence, reports, etc. Excludes work order for Facilities Maintenance See: FM-09 | Originating Department | Electronic, Hard Copy | Event Date + 03 years | August 31 | Operational Value | | Internal | Destroy | Records Centre, Central Filing |
| | PR -01 | Advertisements | Includes publications, artwork and copies of advertisements placed by the Board or schools. Excludes advertisements for job postings. | Originating Department | Electronic, Hard Copy | Event Date + 03 years | August 31 | Operational Value | | Public | Destroy | Records Centre, Central Filing |

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| Public Relations: The function of promoting and marketing board and school programs and services. Records in this function include Board and school communication and press releases, speeches, websites, public relations activities, events and news releases; materials relating to marketing research, publications and reports. | PR-02 | Appreciation & Commendation | Includes general commendations, certificates of appreciation and petitions received from the general public and parents. Excludes records relating to specific employees or student records. | Originating Department | Electronic, Hard Copy | Event Date + 03 years | August 31 | Operational Value | | Public | Destroy | Records Centre, Central Filing |
| | PR-03 | Communication about the Division | Information that comes from external sources pertaining to the Board. | Originating Department | Electronic, Hard Copy | Event Date + 03 years | August 31 | Operational Value | | Public | Destroy | Records Centre, Central Filing |
| | PR-04 | Communications Projects – from the Division | Information that is prepared by communications on behalf of the Board. | Originating Department | Electronic, Hard Copy | Event Date + 03 years | August 31 | Operational Value | | Public | Destroy | Records Centre, Central Filing |
| | PR-05 | Communiqués | Includes memos, brochures, correspondence and related information about programs and activities sponsored by the Board or by schools. | Originating Department | Electronic, Hard Copy | Event Date + 03 years | August 31 | Operational Value | | Public | Destroy | Records Centre, Central Filing |
| | PR-06 | Media Kits, Communications & News Releases | Includes records regarding Board relations with the various media. Includes press releases, marketing and information releases, speeches, photographs, correspondence, etc. | Originating Department | Electronic, Hard Copy | Event Date + 03 years | August 31 | Operational Value | | Public | Archive | Records Centre, Central Filing |
| | PR-07 | Memorabilia & Branding | Includes school/Board memorabilia, collectibles and other historical items that reflect the individual nature of the schools, such as informal school/Board and school authority histories, logos and crests, songs, etc. | School, Originating Department | Electronic, Hard Copy | Event Date + 01 year | August 31 | Operational Value Archival | | Public | Archive | Records Centre, Central Filing |
| | PR-08 | Memos, Special Events, Presentations, Ceremonies & Celebrations | Includes speeches, memos, notices, correspondence with parents and others, programs and all related materials pertinent to events sponsored by the Board or by schools (e.g., parents' night, school opening ceremonies, reunions, community engagement etc.). Records include program schedules, correspondence, brochures, and event activity details. | Originating Department | Electronic, Hard Copy | Event Date + 03 years | August 31 | Operational Value | PIB | Public | Archive | Records Centre, Central Filing |
| | PR-09 | Press Clippings | Includes reports from newspapers, magazines, websites and other publications regarding the Board and school authority, school, staff, students and trustees | Originating Department | Electronic, Hard Copy | Event Date + 03 years | August 31 | Operational Value | | Public | Destroy | Records Centre, Central Filing |
| | PR-10 | Publications | Includes records for publications such as yearbooks, handbooks, marketing materials, calendars, annual reports, brochures, newsletters, and other promotional materials. | Originating Department | Electronic, Hard Copy | Event Date + 02 years | August 31 | Not specified 180 Operational Value Archival | PIB | Public | Destroy | Records Centre, Central Filing |
| | PR-11 | Publications - External | Includes records for publications such as handbooks, marketing materials, calendars, annual reports, brochures, newsletters, and other promotional materials. | Originating Department | Electronic, Hard Copy | Event Date + 02 years | August 31 | Not specified, 180, Operational Value, Archival | PIB | Public | Destroy | Records Centre, Central Filing |
| | CG-01 | Administrative Guidelines, Policies & Directives | Includes records regarding directives approved by the Superintendent of Schools referencing internal controls. Records may also include regulations and procedure manuals, guidelines and directives, and all other procedures established by departments and programs. | Superintendent | Electronic, Hard Copy | Event Date + 02 years | Until obsolete or superseded | Not specified, 170, 202, Archival | | Public | Archive | Records Centre |

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| Corporate Governance: The function of governing boards/schools and exercising legal authority and control. The corporate governance structure specifies the distribution of rights and responsibilities among different participants in boards/schools, such as the Board and staff, and spells out the rules and procedures for making decisions on its affairs. Includes resolutions, bylaws, policies and procedures, charters, Board meeting administration, and strategic planning. | CG-02 | Articles of Incorporation, By-laws & Constitution | Includes records related to the operation of the school board and capture details about the legal entity. | Business & Finance | Hard Copy | Event Date + 02 years | Dissolution of the Corporation | Archival | | Public | Archive | Records Centre, Central Filing |
| | CG-03 | Board Approved Guidelines, Policies and Directives | Includes records relating to the planning & development (includes agendas) and approval (motion) of the Board and school operating practices, activities, and policies that apply Division-wide that have been approved by the Board. Includes best practices, guidelines, procedures, handbooks, and standards approved by the Board. | Superintendent, Business & Finance, Communication | Electronic, Hard Copy | Event Date + 02 years | Superseded or obsolete Core records may have archival value | Operational Value, Not specified, 170, 180, Archival | | Public | Archive | Records Centre |
| | CG-04 | Committees - External - Board | Includes records of external committees and councils on which Board members sit. Records include agendas, reports, resolutions and any documentation, which reflects obligations of the Board. | Originating Department | Electronic, Hard Copy | Event Date + 13 years | August 31 | Operational value | PIB | Internal | Archive | Records Centre, Central Filing |
| | CG-05 | Committees of the Board | Committees consisting of trustees, created by the Board for a specific purpose. Includes agenda, minutes, resolutions, terms of reference, meeting briefs and supporting documentation. i.e. Committee of the Whole | Originating Department | Electronic, Hard Copy | Event Date + 02 years | August 31 | 170, 183, Archival | PIB | Internal | Archive | Records Centre, Central Filing |
| | CG-06 | Committees - General | Includes routine committee work such as school standing, ad hoc committees, directors' steering, standing, and advisory committees, and task forces. Examples include the Employee Assistance Program advisory committee; and Special Education advisory committee. Records include agendas, minutes, reports, and supporting documentation. | Originating Department | Electronic, Hard Copy | Event Date + 03 years | August 31 | Operational value | PIB | Internal | Destroy | Records Centre, Central Filing |
| | CG-07 | Elections | Includes records of elections procedures and information. NOTE: Ballot boxes are to be kept sealed for 6 weeks following the election (Section 101 of the LAEA). Nomination papers are kept for the term of the office (Section 28(5) of the LAEA). | Superintendent, Business & Finance | Hard Copy | Event Date + 07 years | Until obsolete or superseded | Operational value, 230 | | Confidential | Destroy | Central Filing, Vault |
| | CG-08 | External Guidelines, Policies & Directives | Includes documentation about initiatives and guidelines provided by Alberta Education. Records include memoranda, directives, and correspondence such as Alberta Education Guidelines and Ministry Policy/Program Memoranda. | Superintendent, Business & Finance, Learning Services | Electronic, Hard Copy | Event Date + 03 years | Superseded or obsolete | Operational value, Not Specified, 170 | | Public | Destroy | Records Centre, Central Filing |
| | CG-09 | Intergovernmental Reporting & Communication | Includes correspondence and reports between the Board and various levels of government such as the municipality, provincial ministries, etc. Also includes correspondence and information on other school boards. | Business & Finance, Superintendent | Electronic, Hard Copy | Event Date + 13 years | August 31 | Operational value | | Public | Destroy | Records Centre, Central Filing |

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| | CG-10 | School Council | Includes records of the school council; agendas, minutes, terms of reference, and supporting documentation. Excludes Parent societies/associations/advisory committees. These are separate entities from the Board. | School Council, Superintendent | Electronic, Hard Copy | Event Date + 07 years | August 31 | Operational value, 180, Archival, *Superintendent is provided an Annual School Council Report and not responsible for any other records in this records type | | Public | Destroy | Records Centre, Central Filing |
| | CG-11 | Trustee Management | Includes elections information, personal information, directories and news items regarding the trustees. Also includes the trustees' distribution and orientation information. | Business & Finance, Personnel Relations | Electronic, Hard Copy | Event Date + 07 years | Expiry of term of office | Not specified, 170 | PIB | Internal | Archive | Records Centre, Central Filing, Vault |
| | CG-12 | Organization Structure | Includes records regarding reporting relationships, organization structure, organization analysis, etc. for both schools and school board. Includes organizational charts and school profiles. | Personnel Relations | Electronic, Hard Copy | Event Date + 02 years | August 31 | Operational Value | | Public | Archive | Records Centre, Central Filing, Vault |
| | CG-13 | Program Administration | Includes records related to district-wide and/or area program oversight and administration of programs that do not belong to a specific function. Excludes: Educational Programs, Community Programs, Health and Safety Programs, etc. SEE applicable function series for information for exclusions. | Originating Department | Electronic, Hard Copy | Event Date + 02 years | August 31 | Operational Value | | Public | Archive | Records Centre, Central Filing, Vault |
| | CG-14 | Complaints | Includes records related to complaints about the board and/or school and its activities. Includes correspondence, investigations, findings and related reports regarding resolution. Also includes complaints retained by administrators in schools. | Originating Department | Electronic, Hard Copy | Event Date + 1 year | Date complaint resolved | 74, Archival | | Public | Archive | Records Centre, Central Filing, Vault |
| Educational Programs: The function of applying curriculum guidelines and designing education programs for students. Records include but are not limited to proposals, correspondence, lesson plans, and course outlines. | EP-01 | Development & Design | Includes proposals, correspondence and curriculum development materials. | Learning Services | Electronic | Event Date + 05 years | Until program obsolete or superseded | 15, 20 *If individual copyright applies, refer to citation 15 | | Internal | Archive | Records Centre |
| | EP-02 | Locally Developed Courses | Includes proposals, correspondence and curriculum development materials. | Learning Services | Electronic | Event Date + 05 years | Termination of the program | 15, 20 *If individual copyright applies, refer to citation 15 | | Internal | Archive | Records Centre |
| | EP-03 | Optional or Alternate | Records include information on the development, administration, and management of programs such as homeschooling, Registered Apprenticeship Program (RAP), work experience, languages, FNMI, religious instruction, etc. Excludes: Student Records SEE: SI-10 | Superintendent, Learning Services | Electronic | Event Date + 13 years | August 31 | Operational Value | | Internal | Destroy | Records Centre |
| | EP-04 | Outline, Course of Study | Includes outlines of available programs and courses of study. Excludes: Home Schooling SEE: EP-03 | Superintendent, Learning Services | Electronic | Event Date + 07 years | August 31 | Operational Value | | Internal | Destroy | Records Centre |

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| | EP-05 | Planning & Curriculum Guidelines | Includes directives, guidelines, and proposals for new curriculum programs. Includes meeting notes and reports, material regarding comparisons with programs in other school boards. Includes program review reports and other valuations of specific programs in the curriculum. (e.g., junior/senior kindergarten, French immersion). | Learning Services | Electronic | Event Date + 05 years | Until program obsolete or superseded | Operational Value | | Internal | Destroy | Records Centre |
| | EP-06 | Library Management | Includes records related to board and school library/learning commons operations. Records include collection inventories, correspondence, acquisition and disposal planning and strategies, and other records related to library holdings and operations. | School, Learning Services, Information Technology | Electronic | Event Date + 02 years | August 31 | Operational Value | | Internal | Destroy | Division Approved Library Management Software, Records Centre |
| Facilities & Maintenance Management: The function of managing and maintaining Board and school authority buildings and facilities and supporting capital initiatives and building improvements. Records include maintenance and operations reports, requests and logs, environmental testing of facilities, equipment maintenance and testing, facilities planning and improvements, capital and non-capital projects, inspection reports, and records relating to property acquisition and disposition, building and office renovations, security, and property | FM-01 | Building and Site Approvals | Includes documentation such as site plan approvals, building permits and reports pertaining to the approval of building plans by the municipality, Fire Marshall's Office, Ministry of Education, Ministry of Health, and other government bodies. | Facilities | Electronic, Hard Copy | Event Date + 10 years | Disposal of property | Operational value, Legal Value, 146, 169, Archival | | Internal | Archive | Records Centre, Facilities Building |
| | FM-02 | Division Completed Projects | Includes the complete record of projects executed by the Division's Facility and Maintenance Department. Which can include but not limited to Drawings, Vendor and procurement records, purchase orders, Site plans, building permits, etc. | Facilities | Electronic, Hard Copy | Event Date + 10 years | August 31 of year of disposal of property | Operational value Legal Value 146, 169 Archival | | Internal | Archive | Records Centre, Facilities Building |
| | FM-03 | Drawings and Specifications | Includes technical specifications for a project or property, e.g., mechanical, electrical and structural. Includes building and fire code requirements and architect's instructions. Includes all drawings and plans of schools and offices, such as master drawings and floor plans, site plans, aerial plans, and plans for additions and alterations. | Facilities | Electronic, Hard Copy | Event Date + 10 years | August 31 of year of disposal of property | 146, 202, Archival | | Internal | Archive | Records Centre, Facilities Building |
| | FM-04 | Facilities Planning | Includes records regarding the allocation of classroom and workspace to staff and students. Records include correspondence, proposed student enrolment studies and reports, facilities use plans, facilities designs, and layouts, furniture layouts, etc. | Facilities | Electronic | Event Date + 10 years | August 31 | Operational Value | | Internal | Destroy | Records Centre |
| | FM-05 | Facility Booking | Records of bookings issued by the board for the use of school property. | Originating Department, School | Electronic, Hard Copy | Event Date + 03 years | August 31 | Not specified, 169, 146, Operational Value | | Internal | Destroy | Originating Department, School, Division Approved Software |
| | FM-06 | Infrastructure, Maintenance and Renewal Projects (IMR) | Includes project records regarding building improvements and supporting documents specific to additions, renovations, and alterations to schools and buildings. Records include drawings, project plans, specifications, meeting minutes, project updates, budgets, etc. | Facilities | Electronic, Hard Copy | Event Date + 10 years | August 31 of year of disposal of property | 146, 202, Archival | | Internal | Archive | Records Centre, Facilities Building |

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| management relationships | FM-07-01 | Inspections, Testing Logs and Report: Fire Protection System and Emergency Power Systems | Reports Includes records regarding the inspection and testing of emergency power systems, fire extinguishers and fire protection systems. | Facilities | Electronic, Hard Copy | Event Date + 01 years | Superseded or obsolete | Operational Value | | Internal | Destroy | Records Centre, Facilities Building |
| | FM-07-02 | Inspections, Testing Logs and Reports | Includes all documentation to support the inspection and testing of buildings, equipment, physical plant, and property. Records include logs, inspection reports, year-end reports, equipment lists, and locations. Includes elevator logs, boilers, and pressure systems, sanding and salting logs, certificates of inspection, deficiency lists, inspection sheets, condition analysis and reports. Also includes inspections of major systems, playground equipment inspections logs, chemical treatment log, playground inspections, physical education equipment inspections, technical program equipment, etc. Excludes: Emergency power systems inspections and testing, fire extinguisher testing, fire protection systems testing. SEE: FM-07-01 Excludes: Health and Safety logs and inspection reports SEE: HS-02 Excludes: Air Quality SEE: HS-01 | Facilities | Electronic, Hard Copy | Event Date + 06 years | Superseded or obsolete | 120, 122, 163, 164, 202 | | Internal | Destroy | Records Centre, Facilities Building |
| | FM-08 | Land Surveys | Includes land survey information such as legal property surveys, construction layout and control surveys, and field notes. | Facilities | Electronic, Hard Copy | Event Date + 10 years | Disposal of property | 146, Archival | | Internal | Archive | Records Centre, Facilities Building |
| | FM-09-01 | Maintenance and Operations: General | Includes records regarding maintenance of Board-owned facilities, such as maintenance, and repair requirements and arrangements, service work orders and schedules. Excludes: Fixed Asset maintenance and operations, See Maintenance & Operations: Buildings/Physical Plant & Equipment SEE: FM-09-02 | Facilities | Electronic, Hard Copy | Event Date + 05 years | August 31 | Operational Value | | Internal | Destroy | Records Centre, Facilities Building |
| | FM-09-02 | Maintenance and Operations: Buildings/Physical Plant and Equipment | Includes records related to support the maintenance and operations of buildings, physical plant, and equipment. Includes office equipment, work orders for fixed assets and supporting documentation. | Facilities | Electronic, Hard Copy | Event Date + 05 years | August 31 | Operational Value, Not specified, 163, 202 | | Internal | Destroy | Records Centre, Facilities Building |
| | FM-09-03 | Maintenance and Operations: Grounds and Pesticides | Maintenance requisitions, work orders, logs and reports showing action taken re grounds keeping, snow clearance, and cleaning. Maintenance requisitions, work orders, logs and reports on pesticide application. | Facilities | Electronic, Hard Copy | Event Date + 05 years | August 31 | Operational Value, 159*, Legislations only applies to under certain circumstances | | Internal | Destroy | Records Centre, Facilities Building |
| | FM-09-04 | Maintenance and Operations: Keys and Fobs Control | Includes records regarding control of keys and FOBs, which includes logs of key issuance and receipt acknowledgement, filled out forms for fobs issued and received. | Originating Department, Facilities, Safety | Electronic, Hard Copy | Event Date + 01 years | Superseded or Obsolete | Operational Value | PIB | Internal | Destroy | Records Centre, Facilities Binders |

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| | FM-10 | Site Specific Projects | Records regarding renovations/restorations and repair to existing Board-owned facilities, such as reports and studies, inspection and remedial repair work reports, condition survey, design notes, technical specifications, copies of purchase orders, copies of contract documents, progress meetings, and deficiency reports, project review and final drawings and reports. Excludes: Original purchase orders SEE: FA-22 Excludes: Original contract documents SEE: LE Series | Facilities | Electronic, Hard Copy | Event Date + 10 years | August 31 of year of disposal of property | 146, 202, Archival | | Internal | Archive | Records Centre, Facilities Building |
| Finance & Accounting: The function of managing Board and school financial and accounting resources. Includes establishing and operating and maintaining accounting (payables, receivables, revenue) systems, controls and procedures, financial planning, reporting, preparing budgets and budget submissions, and the monitoring and analysis of capital assets. Records include but are not limited to accounts payable and receivable, budgets, audits, benefits accounting, expense payments, financial reporting, fixed asset management and all matters | FA-01 | Accounts Payable | Includes records documenting funds payable such as legal fees, trustee and employee expenses, procurement credit card (P-Card) payment, vendor transaction listings, payment vouchers, cheque requisitions, gas, hydro and phone bills, petty cash disbursements and supporting documentation. | Finance | Electronic, Hard Copy | Event Date + 07 years | August 31 | 36, 42, 71 | PIB | Confidential | Destroy | Division Approved Accounting Software, Division Office, Facilities Building |
| | FA-02 | Accounts Receivable | Records related to the accounting for money owed to schools and boards. Records include invoices, cash receipts, correspondence, cash lists and statements of account. | Finance | Electronic, Hard Copy | Event Date + 07 years | August 31 | 36, 42, 71 | PIB | Confidential | Destroy | Division Approved Accounting Software, Division Office, Facilities Building |
| | FA-03 | Banking | Includes records regarding banking transactions and relationships with banks. Includes bank statements, bank reconciliations, deposit records, cancelled cheques, cheque stubs and money order rates. | Finance | Electronic, Hard Copy | Event Date + 07 years | August 31 | 36, 42, 71, 222 | | Confidential | Destroy | Division Approved Accounting Software, Administrative & Finance Vault, Facilities Building |
| | FA-04 | Benefits Administration | Includes records regarding the administration of benefits generally, not shown elsewhere in this series. Records may include brochures, rates, quotes, correspondence and explanatory documents regarding benefits offered to employees such as group insurance, dental plans, and employee assistance program. Excludes: Individual Employee Benefit | Finance | Electronic, Hard Copy | Event Date + 02 years | Contract lapses or records are superseded | Operational Value | | Confidential | Destroy | Division Approved Accounting Software, Payroll Files, ASEBP Website |
| | FA-05 | Capital Projects – Financing | Includes records relating to the financing of capital projects. Includes quarterly reports, working papers, building monthly costs, capital payment vouchers, approvals, costing, capital expenditure forecasts and correspondence with architects and contractors. | Finance | Electronic, Hard Copy | Event Date + 07 years | August 31 of the year of project's completion | 36, 42, 71, 202 | | Public | Destroy | Division Approved Accounting Software, Administrative & Finance Vault, Facilities Building |

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| regarding the allocation and control of funds. | FA-06 | Capital Revenue | Includes records related to capital revenue from sale of property and rental income from leased premises another sources. | Finance | Electronic, Hard Copy | Event Date + 07 years | August 31 of the completion of sale | 36, 42, 71, 146 | | Internal | Destroy | Division Approved Accounting Software, Administrative & Finance Vault, Facilities Building, Division Server |
| | FA-07 | Enrolment Reporting and Projections | Includes all counts and projections documenting enrolments of students in the school system and statistical reports required by Alberta Education as part of the funding process for the preparation of educational statistics. | Finance | Electronic, Hard Copy | Event Date + 07 years | August 31 | Operational Value Note: There is no specified retention period for these reports. The current retention period is based on the need to support other financial data. | | Public | Destroy | Division Approved Accounting Software, Administrative & Finance Vault, Division Server |
| | FA-08 | Fees | Includes records regarding fee collection and fundraising by schools and/or Division such as school fees, fee collection and supporting documentation (may also include funds allocated to or raised by the student council) Excludes: Agreements and Contracts & Funding and Fundraising Charitable Organization SEE: FA-13 | Originating Department | Electronic, Hard Copy | Event Date + 07 years | August 31 | 42, 71, 90 | | Public | Destroy | Division Approved Accounting Software, Administrative & Finance Vault, Division Server |
| | FA-09 | Financial Audits | Includes records regarding internal and external financial audits of accounts. Also includes records regarding tax audits of Goods and Services Tax (GST) conducted by the Federal Government and other external auditors and internal auditors, such as working papers, audit reports and post audit correspondence. Excludes: Non-financial Audits | Finance | Electronic, Hard Copy | Event Date + 10 years | August 31 | 36, 42 | | Internal | Destroy | Central Filing, Records Centre, Division Approved Accounting Software, Administrative & Finance Vault |
| | FA-10 | Financial Reports and Forecasts | Includes records relating to general ledger (GL) balancing, including GL reports, variance reports, yearly schedule, and variance report changes, financial and economic planning and analysis of various financial issues such as revenue analysis, tax, GST, planning and analysis and related correspondence. | Finance | Electronic, Hard Copy | Event Date + 07 years | August 31 | 36, 42, 65, 71 | | Internal | Destroy | Central Filing, Records Centre, Division Approved Accounting Software, Administrative & Finance Vault, Division Server |
| | FA-11-01 | Financial Statements – Final Audited | Includes records regarding the final, signed, Board approved year-end financial statements and final statements. | Finance | Electronic, Hard Copy | Event Date + 25 years | August 31 | 42, 71, 180, Archival | | Internal | Archive | Central Filing, Records Centre, Administrative & Finance Vault |

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| | FA-11-02 | Financial Statements – Working/Backup Documentation | Includes records associated with the development of financial statements. | Finance | Electronic, Hard Copy | Event Date + 07 years | August 31 | 42, 180 | | Internal | Destroy | Central Filing, Records Centre, Administrative & Finance Vault |
| | FA-12 | Funding | Includes records related to funding from both government and other sources. Excludes: Agreements and Contracts SEE: LE-04-01, LE-04-02, LE-04-03 Excludes Fees and Fundraising: Fees & Fundraising, FA-08, FA-13 | Originating Department | Electronic, Hard Copy | Event Date + 07 years | August 31 | 42, 71, 90 | | Internal | Destroy | Central Filing, Records Centre, Administrative & Finance Vault, Division Server |
| | FA-13 | Fundraising Charitable Organization | Includes records regarding the raising of funds for charitable organizations (completed contribution forms, promotional materials and reports) Excludes Funding and Fees See: Funding & Fees, FA-08, FA-13 | Originating Department | Electronic, Hard Copy | Event Date + 07 years | August 31 | 90 | | Internal | Destroy | Division Approved Accounting Software, Central Filing, Facilities Building |
| | FA-14 | General Ledgers | Is a collection of all the assets, liability, owner's equity, revenue and expense accounts of the organization | Finance | Electronic, Hard Copy | Event Date + 25 years | August 31 | 42 | | Confidential | Archive | Division Approved Accounting Software, Administrative & Finance Vault |
| | FA-15-01 | Inventory Control: Capital Asset | Records relating to capital assets valued over \$5000 that will have depreciating value, including asset listings, depreciation details, asset transfer information, and details of extraordinary entries. | Finance | Electronic, Hard Copy | Event Date + 10 years | Aug 31 of year of disposal of asset | 71, 202 | | Internal | Destroy | Division Approved Accounting Software, Central Filing Administrative & Finance Vault, Division Server |
| | FA-15-02 | Inventory Control: Non-capital Assets | Records relating to non-fixed assets valued under \$5000, including inventories of Board-owned equipment. Excludes hazardous materials SDS sheets SEE: HS-03 | Originating Department | Electronic, Hard Copy | Event Date + 07 years | August 31 | 71, 202 | | Internal | Destroy | Division Approved Accounting Software, Central Filing Administrative & Finance Vault, Division Server |
| | FA-16 | Investments | Includes records regarding the Board's investments, term deposits and promissory notes, investment portfolios, pooling, adjustments, status reports, performance reports, investment tickets and supporting documentation, and records regarding debentures and bonds issued (initial issuance of the debenture or bond and records of payments made to investors). | Finance | Electronic, Hard Copy | Event Date + 07 years | August 31 of year investment matures | 42, 71 | | Internal | Destroy | Division Approved Accounting Software, Administrative & Finance Vault, Facilities Building |

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| | FA-17 | Journal Vouchers & Journal Entries | Includes completed journal voucher forms, input forms, and all background documentation used to substantiate journal entries. | Finance | Electronic, Hard Copy | Event Date + 07 years | August 31 | 65 | | Confidential | Destroy | Division Approved Accounting Software, Administrative & Finance Vault, Division Office, Facilities Building |
| | FA-18 | Budgets | Includes records pertaining to departmental and Board budgets, both capital and operating and supporting documentation. | Originating Department | Electronic, Hard Copy | Event Date + 07 years | August 31 | Operational Value | | Public | Destroy | Central Filing, Division Approved Accounting Software, Administrative & Finance Vault, Division Office, Division Server |
| | FA-19 | Payroll Administration – Time Management | Generated by employee-entered information in Payroll system. Includes: Records regarding allocation and distribution of labour, such as timesheets, Employee Attendance records cards, vacation / lieu time requests, overtime banked, statutory holidays banked, time, relief pay, daily pay sheets, sickness and accident (S&A), off/on duty report payroll adjustment, time input forms (overtime paid, stand-by, relief authorizations, car allowance claims, shift change, time sheets, statutory holiday paid) wage paid / holiday advance requests, Electronic timesheets (E-timesheets) and supporting documentation. Excludes: Employee Records – Attendance, HR-03-01 | Finance, Payroll | Electronic | Event Date + 07 years | August 31 | 36, 71, 74, 106, 202 | PIB | Confidential | Destroy | Division Approved Accounting Software |
| | FA-20 | Pension Administration | Includes records regarding the administration of pensions such as plan documents, deduction registers, and prior service summary reports, records of decisions, annual/tri-annual evaluations, remittances and reconciliations. Also includes records regarding pension policy decisions. Excludes: Employee specific pension information, FA-21 | Payroll | Electronic, Hard Copy | Event Date + 25 years | Final payout of the pension or date pension records are transferred to pension authority (e.g. LAPP or ATRF) | 3, 71, 106, 217 | | Confidential | Archive | LAPP File Cabinet, Central Filing, ATRF File Cabinet, ATRF Website |
| | FA-21 | Pension Contribution / Support | Includes contribution cards detailing pension and benefits obligations due to retired employees and other annuity or superannuation plans (TPP). Includes payroll records required to determine and verify pension payments | Payroll | Electronic, Hard Copy | Event Date + 06 years | From the end of the year in respect of which those records and books of account are kept | 3, 74, 190, 202, 217 | | Confidential | Archive | LAPP File Cabinet, Central Filing, ATRF File Cabinet, ATRF Website |

| Record Series | Record No. | Record Type | Record Type Scope (Description) | Responsible Department | Record Format | Retention | Retention Event Trigger | Retention Value & Legal Citation | PIB | Information Classification | Action to Record after Retention? | Record Location |
|---|------------|--|--|---|-----------------------|-----------------------|--|---|-----|----------------------------|-----------------------------------|--|
| | FA-22 | Procurement | Includes records regarding the purchase of goods and services; purchase requisitions, purchase orders, requests for proposal, requests for quotations, specifications, invitations to tender, proposals, tender submissions, bid and performance bonds, and all documentation regarding the selection process. | Finance, Facilities, Originating Department | Electronic, Hard Copy | Event Date + 07 years | August 31 | 36, 42, 65, 71 | | Internal | Destroy | Division Approved Accounting Software, Administrative & Finance Vault, Facilities Building, Central Filing |
| | FA-23 | Subsidiary Ledgers, Registers and Journals | Includes all subsidiary ledgers, registers and journals such as payment and receipt journals, payroll registers, purchase order registers, and year-end adjustments. | Finance | Electronic, Hard Copy | Event Date + 07 years | Once obsolete or superseded | 202 | | Internal | Destroy | Division Approved Accounting Software, Administrative & Finance Vault, Facilities Building |
| | FA-24 | Tax Returns | Records relating to federal and provincial tax returns, property and goods and services taxes, charity information returns assessments, receipts, details and supporting documentation. | Finance | Electronic, Hard Copy | Event Date + 10 years | August 31 | 42, 65, 71, 90 | | Confidential | Destroy | Division Approved Accounting Software, Administrative & Finance Vault, Facilities Building |
| | FA-25 | Tuition Agreements (Cost Allocations) | Includes records relating to allocation of tuition and other costs between school boards/authorities, correspondence, reports and related supporting documentation. | Business & Finance | Electronic, Hard Copy | Event Date + 07 years | August 31 | Operational Value | | Internal | Destroy | Division Approved Accounting Software, Central Filing Administrative & Finance Vault, Facilities Building |
| Health & Safety: The function of promoting health and safety, and encouraging attitudes and methods that will lead to improved wellness in the jurisdiction. | HS-01 | Air Quality (Asbestos, Mold Removal and Containment) | Includes records regarding renovation or removal projects on jurisdiction owned facilities containing asbestos/mold. Records include clearance documentation, regarding the removal of asbestos, air quality testing, asbestos removal consulting and removal report, asbestos audit testing, industrial waste receipt and supporting documentation. | Health & Safety, Facilities | Electronic, Hard Copy | Event Date + 12 years | Disposal of property | OHSC Section 26 Limitations Act C L-15.1 s3 | | Internal | Destroy | Records Centre, OH&S Office, Facilities Building |
| | HS-02-01 | Health and Safety - Audits & Inspections | Includes records regarding health and safety audits and inspections. | Health & Safety, Originating | Electronic, Hard Copy | Event Date + 03 years | August 31 of audit and all deficiencies rectified | 202 Alberta Government Website, Maintain or renew a COR | PIB | Internal | Destroy | Records Centre, OH&S Office, Facilities Building |
| | HS-02-02 | Health and Safety - Inspection Reports | Includes records of inspections carried out in accordance with the Occupational Health and Safety Act. | Health & Safety, Originating | Electronic, Hard Copy | Event Date + 03 years | August 31 of inspection and all deficiencies corrected | 106. 122, 202, 225 | PIB | Public | Destroy | Records Centre, OH&S Office, Facilities Building |

| Record Series | Record No. | Record Type | Record Type Scope (Description) | Responsible Department | Record Format | Retention | Retention Event Trigger | Retention Value & Legal Citation | PIB | Information Classification | Action to Record after Retention? | Record Location |
|---|------------|---|--|---|-----------------------|-----------------------|----------------------------------|--|-----|----------------------------|-----------------------------------|---|
| | HS-03 | Designated Substance and Hazardous Materials Management | Includes records related to the monitoring, management and disposal of chemical, biological or physical agents or substances. | Health & Safety, Facilities, School | Electronic | Event Date + 02 years | Date of offence | 120, 122, 202 | PIB | Internal | Destroy | Records Centre, School OH&S Office, Facilities Building |
| | HS-04 | Emergency Plans | Includes records regarding emergencies and related plans to support the Board and school in case of fire or other emergencies. I.e. business continuity plans, call lists, supplier/vendor contacts, and related reports. | Health & Safety | Electronic, Hard Copy | Event Date + 03 years | August 31 | 120, 122 | | Internal | Destroy | Hour Zero, Records Centre, School OH&S Office, Facilities Building |
| | HS-05 | Health & Safety Programs | Includes: Records regarding the development, objectives and administration of safety programs, program audits, guidelines and compliance and statistics. | Health & Safety | Electronic, Hard Copy | Event Date + 03 years | Obsolete or superseded | Operational Value, Not specified 202 | | Internal | Destroy | Records Centre, Facilities Building |
| | HS-06 | Incident Reports | Includes completed forms reporting an incident. Excludes Individual student and employee medical health records (personally identifiable records) and WCB completed forms directly submitted to WCB. | Business & Finance, Health & Safety | Electronic, Hard Copy | Event Date + 20 years | August 31 of incident report | 65, 71, 136, 202 Incident reports relating to a WCB claim may be retained with WCB in LE-01 | PIB | Internal | Destroy | Records Centre, Facilities Building |
| | HS-07 | Physical Security | Includes records regarding the security of office and school facilities and properties, including transportation, sign in and sign out logs, video surveillance, etc. | Originating Department, Facilities, Health & Safety | Electronic, Hard Copy | Event Date + 07 years | August 31 of incident occurrence | Operational Value | PIB | Internal | Destroy | Records Centre, Facilities Building |
| | HS-08 | Safety Data Sheets | Includes safety data sheets (SDS) as created and issued by the manufacturer. Note: Safety data sheets are not records of the Board; however, every location that uses the material must have access to a data sheet, as required by OH&S Act. | Facilities, Health & Safety | Electronic | Event Date + 02 years | Superseded or obsolete | Operational Value. Not specified 202 | | Public | Destroy | Records Centre, Knowledge Centre, Facilities Building, School Facilities Sites/Vehicles |
| Personnel Relations: The function of managing all employees within the organization in accordance with policies and procedures. Records include but are not limited to personnel records, employee | HR-01 | Criminal Records/ Vulnerable Sector Checks | Includes records listing any criminal code convictions (police clearances) that have not been pardoned for all existing and new employees and service providers that come into direct contact with students on a regular basis. | Personnel Relation | Electronic, Hard Copy | Event Date + 02 years | Termination of employment | Operational Value, Not specified, 249 | PIB | Restricted | Destroy | Division Approved HR Software, Personnel File, Facilities Building |
| | HR-02 | Criminal Offence Declarations | Annual offence declarations, signed by the employee/service provider, which lists all criminal code convictions registered since the date of the last offence declaration. | Personnel Relation | Electronic, Hard Copy | Event Date + 03 years | Obsolete or superseded | Operational Value, 249 | PIB | Restricted | Destroy | Division Approved HR Software, Personnel File, Facilities Building |

| Record Series | Record No. | Record Type | Record Type Scope (Description) | Responsible Department | Record Format | Retention | Retention Event Trigger | Retention Value & Legal Citation | PIB | Information Classification | Action to Record after Retention? | Record Location | |
|--|------------|--|--|---------------------------------------|-----------------------|-----------------------|---|---|-----|----------------------------|-----------------------------------|--|--|
| collective agreements, employee information (including medical information), and conditions of work, overtime, salary rates, pensions, benefits, payroll records, grievances, performance evaluations and recruitment. | HR-03-01 | Employee Records - Attendance | Includes records regarding the management of employee attendance, absences (leaves and sabbaticals) and vacations. Records include details about vacation schedules, hours of work, absenteeism reports and related reports from electronic systems. Excludes: Individual employee time management SEE: FA-19 | Personnel Relation | Electronic, Hard Copy | Event Date + 03 years | August 31 | 106 | PIB | Confidential | Destroy | Division Approved HR Software, Personnel File, Facilities Building | |
| | HR-03-02 | Employee Records: Master | Includes records regarding the employment history of the Board employees. Includes initial resume and application, internal applications, benefit enrolment forms, salary calculation forms, change advice, employee master record cards, certification of level placement, probationary contract, key tasks, and employee verification forms. Excludes: Employee Payroll Records, FA-19: SEE Employee Records: Payroll, FA-19 | Personnel Relation | Electronic, Hard Copy | Event Date + 80 years | Employee Date of Birth | 3, 36, 74, , 106, 119, 125, 170, 202, 216, 217 The Division has decided to follow the Federal Retention Guideline. | PIB | Restricted | Destroy | Division Approved HR Software, Personnel File, Facilities Building | |
| | HR-03-03 | Employee Records: Payroll | Includes records regarding individual employee payroll information, such as TD1s, logbooks, direct deposit authorizations, car allowance, and business travel forms and supporting documentation. | Personnel Relation | Electronic, Hard Copy | Event Date + 80 years | Employee Date of Birth | 74, 202 The Division has decided to follow the Federal Retention Guideline. | PIB | Confidential | Destroy | Division Approved HR Software, Personnel File, Facilities Building | |
| | HR-03-04 | Employee Records: Performance Management | Includes records regarding employee's performance, such as reviews by supervisors, performance development process forms, commendations, disciplinary, performance and non-medical counselling notes and supporting documentation. | Personnel Relation | Electronic, Hard Copy | Event Date + 03 years | Termination of Employment | Operational Value, Not specified, 170, 202 | PIB | Confidential | Destroy | Division Approved HR Software, Personnel File, Facilities Building | |
| | HR-03-05 | Employee Records: Training | Includes records regarding employee training supported by the Division, including conferences and seminars, and certifications / accreditation that an employee or a subcontractor must possess in order to successfully fulfill the position requirements. | Personnel Relation, Learning Services | Electronic, Hard Copy | Event Date + 03 years | Until obsolete or superseded | Operational Value | PIB | Confidential | Destroy | Division Approved HR Software, Personnel File, Facilities Building | |
| | HR-04 | Job Descriptions | Includes job descriptions and specifications as well as background information used in their preparation or amendment and positions of responsibility. | Personnel Relation | Electronic, Hard Copy | Event Date + 02 years | Until obsolete or superseded | Operational Value | | | Internal | Destroy | Division Approved HR Software, Personnel File, Facilities Building |
| | HR-05-01 | Labour Relations: Grievances & Arbitration | Includes records regarding grievances filed by employees, such as evaluation reports, notifications, correspondence with unions concerning grievance initiators, and legal opinions. NOTE: Service Units to forward all grievance material to Personnel Relations upon settlement of the grievance. | Personnel Relation | Electronic, Hard Copy | Event Date + 05 years | Settlement of the grievance / arbitration or expiration of the appeal | 74 | PIB | Internal | Archive | | Division Approved HR Software, HR Filing |

| Record Series | Record No. | Record Type | Record Type Scope (Description) | Responsible Department | Record Format | Retention | Retention Event Trigger | Retention Value & Legal Citation | PIB | Information Classification | Action to Record after Retention? | Record Location |
|---------------|------------|---|--|--|-----------------------|-----------------------|---|---|-----|----------------------------|-----------------------------------|--|
| | HR-05-02 | Labour Relations: Negotiations & Agreements | Includes records regarding the administration and interpretation of the Board's collective agreements and includes seniority lists, implementation plans, records related to collective bargaining, e.g., final offers, memoranda of settlement, mediations, arbitrations used in preparation for bargaining. Also includes relationship and contact with management exempt staff associations and supporting documentation. Excludes actual collective agreements. | Personnel Relation | Electronic, Hard Copy | Event Date + 05 years | Date collective agreement expires | 106, 141 | PIB | Internal | Archive | Division Approved HR Software, HR Filing, Business & Finance |
| | HR-05-03 | Labour Relations: Union Certification | Includes original documents concerning the certification of Labour unions. | Personnel Relation | Electronic, Hard Copy | Event Date + 01 years | Dissolution of the Union | 141 | | Internal | Destroy | Division Approved HR Software, HR Filing |
| | HR-06 | Recruitment and Hiring | Includes records regarding the administration of a specific competition such as requisitions, copies of advertisements, evaluation criteria, career fairs records and blank interview guides. Excludes: Specific Resumes and Job Applications SEE: HR-07 | Personnel Relation | Electronic | Event Date + 03 years | Completion of competition | Operational Value | | Internal | Destroy | Division Approved HR Software, HR Filing |
| | HR-07 | Resumes and Job Applications | Records include applications, resumes and applicant evaluations to support recruitment in the school and school board. Excludes resumes of candidates selected to be interviewed. NOTE: Shred and delete unsolicited resumes on receipt. | Personnel Relation | Electronic | Event Date + 03 years | Competition completed or date of receipt of resume/application if unsolicited | Operational Value | PIB | Internal | Destroy | Division Approved HR Software, HR Filing |
| | HR-08 | Salary Administration | Includes records regarding the planning and scheduling of salaries, such as job evaluations, job classification systems, salary surveys and schedules, salary increments, service pay and substitution pay. | Personnel Relation | Electronic | Event Date + 03 years | Until obsolete or superseded | Operational Value, 36, 71, 74, 106, 106, 202 | | Internal | Destroy | Division Approved HR Software, HR Filing |
| | HR-09 | Staff Awards, Recognition and Honours | Includes records relating to special recognition and awards presented to staff. | Personnel Relation | Electronic, Hard Copy | Event Date + 03 years | Historical value Subject to inclusion in the employee record | Operational Value | PIB | Internal | Destroy | Division Approved HR Software, HR Filing |
| | HR-10 | Staff Listings and Reports | Includes all report listings concerning staff, e.g., staff directories, seniority lists, retirement lists and lists of substitute teachers. Excludes: Emergency Call Out Lists SEE: HS-04 | Personnel Relation | Electronic | Event Date + 03 years | Until superseded. | Operational Value, Not specified, Archival – staff list | PIB | Internal | Destroy | Division Approved HR Software, HR Filing |
| | HR-11 | Training Program Records | Includes Records regarding various internal and external training and education programs offered to employees. Excludes: Specific employee records pertaining to training. SEE: HR-03-05 | Personnel Relation, Originating Department | Electronic, Hard Copy | Event Date + 07 years | August 31 | Operational Value | | Internal | Destroy | Division Approved HR Software, HR Filing |

| Record Series | Record No. | Record Type | Record Type Scope (Description) | Responsible Department | Record Format | Retention | Retention Event Trigger | Retention Value & Legal Citation | PIB | Information Classification | Action to Record after Retention? | Record Location |
|---|------------|------------------------|---|---|---------------------------------|-----------------------|---|--|--|----------------------------|-----------------------------------|--|
| | HR-12 | Volunteers | Records include volunteer registration, guidelines, correspondence, criminal record and vulnerable sector checks, offense declarations, confidentiality agreements, technology use agreements and drivers' abstracts. | Schools | Electronic, Hard Copy | Event Date + 03 years | Retention should consider the procedures in place for volunteer management. | Operational Value | PIB | Internal | Destroy | Division Approved HR Software, HR Filing |
| Information Management: The function of applying and managing information and communications technology to support the business needs of the organization to capture, store, retrieve, transfer, communicate and disseminate information. Includes planning, determining requirements, developing, acquiring, modifying and evaluating information and systems to house information such as applications and databases. Also includes the systematic management of information and the appropriate decommission of systems and disposition of information. | IM-01-01 | FOIP | Disclosure of Personal Information | School Site, Personnel Relation | Electronic, Hard Copy | Event Date + 01 years | Disclosure of information | 125, 246 & 250 may apply under certain circumstances | | Internal | Destroy | School, Central Filing, Records Centre |
| | IM-01-02 | | Investigations | Personnel Relation | Electronic, Hard Copy | Event Date + 07 years | Once final report is completed | Operational Value | PIB | Confidential | Destroy | Division Approved HR Software, HR Filing |
| | IM-01-03 | | Personal Information Banks (PIB) | Personnel Relation | Electronic, Hard Copy | Event Date + 01 years | Until obsolete or superseded | Operational Value, 125 | PIB | Confidential | Destroy | Division Approved HR Software, HR Filing, Records Centre, Central Filing |
| | IM-01-04 | | Privacy Impact Assessments (PIA) | Personnel Relation | Electronic, Hard Copy | Event Date + 03 years | Until obsolete or superseded | Operational Value, 125 | | Confidential | Destroy | Division Approved HR Software, HR Filing, Records Centre, Central Filing |
| | IM-01-05 | | Requests and Replies | Personnel Relation | Electronic, Hard Copy | Event Date + 05 years | Once request is closed | Operational Value, 125 | PIB | Confidential | Destroy | Division Approved HR Software, HR Filing, Records Centre, Central Filing |
| | IM-01-06 | | Statistics | Personnel Relation | Electronic, Hard Copy | Event Date + 03 years | August 31 | Operational Value | PIB | Internal | Destroy | Division Approved HR Software, HR Filing, Records Centre, Central Filing |
| | IM-02-01 | Information Technology | Access Control and Password Records | Records related to the management of and access to programs. Includes active directory (database), individual access, password management, email management, etc. | Information Technology, Finance | Electronic | Event Date + 6 months | Termination of employee | Operational Value *Log of deleted account is maintained by Technology Dept. | PIB | Internal | Destroy |

| Record Series | Record No. | Record Type | Record Type Scope (Description) | Responsible Department | Record Format | Retention | Retention Event Trigger | Retention Value & Legal Citation | PIB | Information Classification | Action to Record after Retention? | Record Location |
|---------------|------------|--------------------------------------|---|--|---------------|-----------------------|--|----------------------------------|-----|----------------------------|-----------------------------------|--------------------|
| | IM-02-02 | Architecture | Records relating to the design of computer systems and/or software, including needs assessments, business cases, project charter, process flowchart documentation, impact analysis, user and system requirements, specifications, testing plans and results, user sign-offs, project management meeting minutes/documentation, system development documentation, software design records, and software inspection notes. Also includes records on system installations/conversions and product evaluations. May also include requests for significant modification, fixes and upgrades. | Information Technology | Electronic | Event Date + 07 years | August 31 | Operational Value | | Internal | Destroy | Records Centre |
| | IM-02-03 | Backup Server | Backup server are considered transitory records until they are required in the event of a disaster or the Division is required to access for data recovery. | Information Technology | Electronic | Event Date + 21 days | Server data is on a 21 day deletion cycle | Operational Value | | Internal | Destroy | Servers |
| | IM-02-04 | Functional, Technical Specifications | Includes records regarding systems development functional and technical specifications and requirements, such as background requests, requirement definitions, studies, surveys, stakeholder engagement information and business cases used to design/develop software/hardware specifications. Also includes acceptance/compatibility criteria, modeling, final specifications and supporting documentation. | Information Technology | Electronic | Event Date + 01 year | Life of System | Operational Value | | Internal | Destroy | Records Centre |
| | IM-02-05 | Helpdesk | Includes records regarding the performance of typical daily helpdesk functions for the Division. Records include helpdesk submissions background documentation submitted by the user, scripts used by the helpdesk to respond to inquiries. NOTE: Records may be escalated to Maintenance and Support SEE: IM-02-08 | Information Technology, Originating Department | Electronic | Event Date + 01 years | Until obsolete or superseded / Ticket resolved | Operational Value | | Internal | Destroy | Help Desk Software |
| | IM-02-06 | Information Security | Includes records pertaining to the protection of information and information systems from unauthorized access, use, infection from viruses, disclosure, disruption, modification, perusal, inspection, recording or destruction in accordance with confidentiality, integrity and availability requirements. Excludes: Physical Security SEE: HS-07 | Information Technology | Electronic | Event Date + 03 years | Superseded or obsolete | Operational Value | | Internal | Destroy | Records Centre |
| | IM-02-07 | Installation and Implementation | Includes records regarding system installation / implementation, such as data conversion plans, copies of agreements with third parties, mapping information and implementation plans. | Originating Department, Information Technology | Electronic | Event Date + 01 year | Life of System | Operational Value | | Internal | Destroy | Records Centre |

| Record Series | Record No. | Record Type | Record Type Scope (Description) | Responsible Department | Record Format | Retention | Retention Event Trigger | Retention Value & Legal Citation | PIB | Information Classification | Action to Record after Retention? | Record Location |
|---------------|------------|------------------------|------------------------------------|--|-----------------------|---------------------------------------|------------------------------|--|-----|----------------------------|--|---|
| | IM-02-08 | Information Technology | Maintenance and Support | Information Technology | Electronic | Event Date + 01 years | Life of System | Operational Value | | Internal | Destroy | Records Centre |
| | IM-02-09 | | Information Technology Plan | Information Technology | Electronic | Event Date + 09 years | Until obsolete or superseded | Operational Value | | Internal | Destroy | Records Centre |
| | IM-02-10 | | System, Server, Network Monitoring | Information Technology | Electronic | Event Date + 03 years | August 31 | Operational Value | | Internal | Destroy | Records Centre |
| | IM-02-11 | | Tele-communication Systems | Finance, Information Technology | Electronic, Hard Copy | Event Date + 03 years | August 31 | Operational Value | | Internal | Destroy | Records Centre, Central Filing, Division Approved Accounting Software |
| | IM-02-12 | | Google Workspace Digital Assets | Information Technology, Records Management | Electronic, Hard Copy | Event Date + 07 years, unless labeled | Last Date Modified | Operational Value, See Google Workspace Label List | | Internal | Destroy | Google Workspace |
| | IM-02-13 | | SharePoint Library Digital Assets | Information Technology, Records Management | Electronic, Hard Copy | Event Date + 07 years, unless labeled | Last Date Modified | Operational value determines retention unless a specific record type is designated, in which case the record type's retention policy prevails. | | Internal | Destroy | SharePoint |
| | IM-03-01 | | Records Management | Archives | Records Management | Electronic, Hard Copy | Event Date + 03 months | Expiration of time limited by s. 33.1 for appeal | 20 | PIB | Public, Internal, Confidential, Restricted | Archive |

| Record Series | Record No. | Record Type | Record Type Scope (Description) | Responsible Department | Record Format | Retention | Retention Event Trigger | Retention Value & Legal Citation | PIB | Information Classification | Action to Record after Retention? | Record Location | |
|---------------|------------|---------------------------|--|---|---------------------------------|-----------------------|---------------------------------|----------------------------------|------------------------|----------------------------|-----------------------------------|-------------------------------|--|
| | IM-03-02 | Disposition Authorization | Includes records regarding authorization of records disposition, as well as requests to suspend disposition (holds). Includes original signed disposition forms and accompanying transmittals; documentation accounting for officially missing records; hold authorizations; attachments and supporting documentation. | Records Management | Electronic, Hard Copy | Event Date + 13 years | Dissolution of the Organization | Not specified | PIB | Internal | Archive | Record Centre, Central Filing | |
| | IM-03-03 | | Records Management Administration | Also includes records regarding the development, maintenance, and updating of records management program system documentation. May include records regarding the administration of the records management system such as inventory, lists, location and warehouse information, vendor contact and supplies information, scheduling and supporting documentation. Excludes Disposition Authorizations SEE: IM-03-02 & Retention & Disposition Schedules SEE: IM-03-04 | Records Management | Electronic, Hard Copy | Event Date + 02 years | Superseded or obsolete | Operational Value, 146 | | Public | Destroy | Records Centre, Central Filing |
| | IM-03-04 | | Retention and Disposition Schedule | Records include all histories and versions of approved system documentation. | Records Management | Electronic, Hard Copy | Event Date + 13 years | Until obsolete or superseded | Not specified | | Public | Archive | Knowledge Centre, Records Centre, Central Filing |
| | IM-03-05 | | Transfer and Retrieval | Includes records regarding the transfer of custody and control of records from service units and schools to the records management system or to other jurisdictions. Records include: transmittals, requests for retrieval/return of records. Also includes student request /authorization and supporting documentation. | Records Management | Electronic, Hard Copy | Event Date + 07 years | August 31 | Not specified | PIB | Internal | Destroy | Records Centre, Central Filing |
| | IM-04-01 | Web Administration | Web Content | Includes records regarding web content records such as the content pages that compose the site, inclusive of HTML markup, records generated when a user interacts with a site, lists of the URLs referenced by the site's hyperlinks and supporting documentation. Documents posted on websites are for publication only and are considered transitory. | Originating Departments | Electronic | Event Date + 01 years | Until obsolete or superseded | Operational Value | PIB | Public | Destroy | Black Gold Website (Is this a nested thing? --- are the school's website subsites) |
| | IM-04-02 | | Web Management | Includes: Web management and operations records that provide context related to the site such as administrative and technical records necessary for or produced during the management of a web site. | Information Technology, Schools | Electronic, Hard Copy | Event Date + 03 years | Superseded or obsolete | Operational Value | PIB | Public | Destroy | Black Gold Website |

| Record Series | Record No. | Record Type | | Record Type Scope (Description) | Responsible Department | Record Format | Retention | Retention Event Trigger | Retention Value & Legal Citation | PIB | Information Classification | Action to Record after Retention? | Record Location |
|---|------------|--|---------------|---|---|-----------------------|-----------------------|---|---|-----|----------------------------|-----------------------------------|--|
| | IM-04-03 | | Web Structure | Includes records that provide structure to the web site including site maps that show the directory structure into which content pages are organized, software configurations used to operate the site and establish its look and feel including server environment configurations and specifications and supporting documentation. | Information Technology | Electronic, Hard Copy | Event Date + 03 years | Life of website | Operational Value | PIB | Public | Destroy | Black Gold Website |
| Legal: The function of addressing legal issues relating to the operations of the Board and schools. Records include, but are not limited to, claims and litigation files, appeals and hearings, contracts and agreements entered into on behalf of the Board and schools, deeds and titles relating to properties, harassments incidents, etc. | LE-01-01 | Employee - Accidents / Incident Claims and Reports | | Includes reports related to employee accidents that occur on Board and school authority property, schools and the administration offices or on school trips. Records include claims, communications, investigations, reports, administration of first aid and action taken as a result of the accident. Excludes: claims/ litigations, WCB claims/ reports, HS-06 | Originating location, School or Business & Finance | Electronic, Hard Copy | Event Date + 20 years | Date of incident or report and all action taken | 202 | PIB | Internal | Destroy | Records Centre, School Filing, Division Approved Insurance Software |
| | LE-01-02 | Student Accident Reports | | Includes reports related to student accidents that occur on Board and school authority property, schools and the administration offices or on school trips. Records include claims, communications, investigations, reports, administration of first aid and action taken as a result of the accident. Excludes: claims/ litigations, WCB claims/ reports, HS-06 | Originating location, School or Business & Finance | Electronic, Hard Copy | Event Date + 20 years | Date of incident or report and all action taken | 202 *Original hard copy of Student Accident Reports are retained at the school until the end of the School Year (August 31) and are shredded with a supporting disposition record to be sent to Records Manager for retention. | PIB | Internal | Destroy | Records Centre, Division Approved Insurance Software, School Filing |
| | LE-02 | Appeals / Hearings | | Includes records of hearings conducted with regard to issues that affect the school or school Board. Records include correspondence, reports, discovery findings, hearing proceedings and final decisions. | Superintendent, Business & Finance | Electronic, Hard Copy | Event Date + 5 years | Last action taken that advances claim. | 161, 170, 202 | PIB | Confidential | Archive | Records Centre, Central Filing |
| | LE-03 | Claims / Litigations | | Includes all liability claims and litigation against or entered into by the Board and schools. Records include reports, correspondence, investigations, WCB claims, etc. | Superintendent, Business & Finance, Health & Safety, Personnel Relation | Electronic, Hard Copy | Event Date + 05 years | Last action taken that advances claim | Note: Section 3.1 of the Limitations Act, R.S.A. 2000, c. L-12 provides there is no limitation period applicable to claims involving sexual assault or sexual misconduct, including if the person with the claim was a minor | PIB | Confidential | Archive | HR Filing, Associate Superintendent Human Resources secure filing, Division Insurance Provider, Submitted to WCB |
| | LE-04-01 | Contracts | Educational | Includes records regarding educational related agreements, such as cooperative education agreements, work experience agreements. Excludes: agreements related to employment SEE: LE-04-02 Excludes: agreements related to land : LE-05 | Learning Services, Personnel Relations, Business & Finance | Electronic, Hard Copy | Event Date + 07 years | Contract lapses or completed | Operational Value | PIB | Internal | Destroy | Records Centre, Central Filing |

| Record Series | Record No. | Record Type | Record Type Scope (Description) | Responsible Department | Record Format | Retention | Retention Event Trigger | Retention Value & Legal Citation | PIB | Information Classification | Action to Record after Retention? | Record Location |
|---------------|------------|---|---|---|---|-----------------------|---|----------------------------------|-------------------|----------------------------|-----------------------------------|--|
| | LE-04-02 | Employee | Includes records regarding employee related contracts, such as employment contracts, retirement agreements, etc. which may also contain memos and affidavits of execution and supporting documentation. | Originating Department, Personnel Relations, Business & Finance | Electronic, Hard Copy | Event Date + 07 years | Contract lapses or completed | Operational Value | PIB | Confidential | Destroy | Division Approved HR Software, HR Filing, Records Centre, Central Filing |
| | LE-04-03 | | General | Correspondence and information related to contracts and agreements. | Originating Department, Personnel Relations, Business & Finance | Electronic, Hard Copy | Event Date + 07 years | Contract lapses or completed | Operational Value | PIB | Internal | Destroy |
| | LE-05 | Deeds and Titles | Includes original deeds to any Board-owned property. | Facilities, Business & Finance | Electronic, Hard Copy | Event Date + 10 years | Disposal of property | 144, 146 Archival | | Internal | Archive | Records Centre, Central Filing, Finance Vault, Facilities |
| | LE-06 | Discrimination and Harassment Incidents | Includes records of incidents involving staff and students, incident reports, investigations, and correspondence regarding these issues. Excludes: Appeals / Hearings, LE-02 | Business & Finance, Personnel Relation | Electronic, Hard Copy | Event Date + 10 years | August 31 of report and all actions concluded. 10 years | 170, 193 | PIB | Confidential | Archive | Records Centre, Central Filing, Finance Vault |
| | LE-07 | Insurance Policies | Includes records regarding liability insurance policies held by the Board such as copies of insurance certificates / policy documents and supporting documentation. Also includes records relating to policies to cover loss or damage to property or premises and cover staff and general public against injury or death resulting from accidents on school/Board premises or occurring during employment. Excludes: insurance claims and accident reports, LE-03, LE-01-01, LE-01-02 | Business & Finance | Electronic, Hard Copy | Event Date + 02 years | Expiry date of policy | 202 | | Internal | Archive | Records Centre, Central Filing, Finance Vault |
| | LE-08 | Legal Opinions / Precedents | Records relating to legal opinions and precedents about legal issues identified by the school/Board. Records include case law, correspondence, reports, and findings/opinions provided to requestor. | Superintendent, Business & Finance, Personnel Relation | Electronic, Hard Copy | Event Date + 05 years | Superseded or obsolete | Operational Value | | Confidential | Archive | Records Centre, Central Filing, Finance Vault |
| | LE-09 | Property - Acquisition and Sale | Includes land purchase agreements, development agreements, property appraisals, valuations and quotes concerning land owned by the Board and school authority or under consideration for purchase. Also includes plans, correspondence, reports and backup documentation relating to the acquisition or sale of lands. | Business & Finance | Electronic, Hard Copy | Event Date + 10 years | Disposal of property | 144, 146 Archival | PIB | Internal | Archive | Records Centre, Central Filing, Finance Vault |

| Record Series | Record No. | Record Type | Record Type Scope (Description) | Responsible Department | Record Format | Retention | Retention Event Trigger | Retention Value & Legal Citation | PIB | Information Classification | Action to Record after Retention? | Record Location |
|---|------------|--------------------------------------|---|---|-----------------------|-----------------------|--|----------------------------------|-----|----------------------------|-----------------------------------|---|
| | LE-10 | Property Damage / Trespassing Report | Includes reports and general correspondence regarding property damage, theft or loss. Also includes vandalism reports, copies of repair invoices, monthly and annual summaries. | Originating Department, Facilities, Health & Safety | Electronic, Hard Copy | Event Date + 12 years | Claim first knew, injury occurred, attributable to defendant that warrants bringing proceeding / claim arose; other conditions | 146 | PIB | Internal | Destroy | Records Centre, Central Filing, Finance Vault, Facilities |
| Research & Planning: The function of undertaking research and planning to support the ongoing operations of the school and Board. Records include but are not limited to research surveys, studies and reports that address issues such as school boundaries, student demographics, municipal planning and statistics used to support Ministry funding requests. | RP-01 | Educational and Curriculum Planning | Includes all strategic and operational planning documents, and mandates, related correspondence, background and reference information, records of any research conducted into curriculum or program development, such as questionnaires, interest surveys and independent research studies. | Originating Department, Learning Services | Electronic | Event Date + 03 years | August 31 | Operational Value Archival | | Internal | Archive | Records Centre |
| | RP-02 | External Requests | Includes external applications to conduct research from sources such as universities, graduate students, and foundations, and their final reports | Originating Department, Learning Services | Electronic | Event Date + 01 years | August 31 | Operational Value | | Public | Destroy | Records Centre |
| | RP-03 | School Boundaries | Includes information relevant to the establishment of school boundaries for purposes of enrolment and facility use. Includes boundary descriptions, school attendance areas and maps. | Originating Department, Learning Services, Facilities | Electronic, Hard Copy | Event Date + 13 years | Until superseded or obsolete | Operational Value | | Public | Archive | Records Centre |
| | RP-04 | School Enrolments | Includes records regarding planning and development issues within the municipality that may have implications on enrolments within the school system. Includes subdivision plans, official plan amendments, population reports, and traffic studies. | Originating Department, Business & Finance, Learning Services, Facilities | Electronic, Hard Copy | Event Date + 03 years | August 31 | Operational Value Archival | | Public | Archive | Records Centre, Central Filing |
| | RP-05 | School System | Includes records relating to internal and external research. Records include applications, surveys and research reports undertaken to capture information about school system issues; student evaluation and scoring systems and student backgrounds; school and career selection; external research, applications, surveys and research reports. | Originating Department, Learning Services | Electronic, Hard Copy | Event Date + 01 years | Until superseded or obsolete | Operational Value Archival | | Internal | Archive | Records Centre, Central Filing |
| | RP-06 | Student Demographics | Includes aggregate reports profiling the characteristics of the student population, such as age, grade, promotion, and country of birth, religion, and other trend data. | Originating Department, Learning Services | Electronic, Hard Copy | Event Date + 07 years | August 31 | Operational Value Archival | | Internal | Destroy | Student Cumulative File (Student Records) |
| Student Information: The function of providing students with programs and services in accordance with | SI-01 | Bursaries and Awards | Includes supporting documentation regarding bursaries and awards presented to students at commencement or graduation. Financial records regarding awards should be retained in appropriate record series in Finance. | School, Learning Services, Finance | Electronic, Hard Copy | Event Date + 13 years | August 31 | Operational Value | PIB | Internal | Destroy | Records Centre, Central Filing, Accounts Payable Filing |

| Record Series | Record No. | Record Type | Record Type Scope (Description) | Responsible Department | Record Format | Retention | Retention Event Trigger | Retention Value & Legal Citation | PIB | Information Classification | Action to Record after Retention? | Record Location |
|---|------------|--|---|---------------------------------------|-----------------------|-----------------------|---|--|-----|----------------------------|-----------------------------------|---|
| the Education Act. Records cover such areas as admissions, transfers and withdrawals, Student Records, guidance and counseling, assessments, consent/ permission forms for special activities and programs, and extracurricular programs and participation. | SI-02 | Case Files: Counseling | Includes case files of students who are referred for counseling. Records include referrals, reports, and case notes, authorization and counseling working documents, testing and test keys and supporting documentation. Not to be kept as part of the Student Record. | School Counselors, Student Services | Electronic, Hard Copy | Event Date + 1 year | Retirement or transfer of student | Not specified 170, 184 | PIB | Internal | Destroy | Division's SIS, Counselors Confidential Files |
| | SI-03 | Excursions Administration | Includes records regarding the administration of student exchanges, off site activity, excursions and arrangements for special events related to specific activities, such as concerts, festivals, track meets, facility tours, tournaments, art or essay contests, and science fairs. Records include correspondence, plans, schedules, etc. Excludes: consent forms, SI-10 | School, Learning Services | Electronic | Event Date + 02 years | August 31 | 236 Records may be retained for longer periods if the activity is deemed "high-risk." | | Internal | Destroy | Records Centre |
| | SI-04 | Excursions Signed Forms | Includes requests, consent/permission forms, acknowledgement of risk, correspondence and reports regarding school excursions, on, and off site activities, consent for working in school laboratories (labs) such as science labs. Also includes reports relating to the student(s) involved in student exchanges. Excludes: information on international students and host families SEE: SI-05 | School, Learning Services | Electronic | Event Date + 02 years | August 31 | 236 Records may be retained for longer periods if the activity is deemed "high-risk." Records are kept longer when incident at an excursion occurs | | Internal | Destroy | Division Approved Accounting Software |
| | SI-05 | International Students | Includes records pertaining to out of country students applying to attend schools. Records may include applications for admission, correspondence between the student's family and the International Bureau (Global Learning). May include copies of Government of Canada Embassy information, copies of Visa student permits, banking information and copies of educational reporting while student in attendance at a school. Excludes: Student Record file, SI-10 | Learning Services, Business & Finance | Electronic, Hard Copy | Event Date + 27 years | Date of birth | Operational Value | PIB | Confidential | Destroy | Records Centre |
| | SI-06 | Mature Student Records: Continuing Education | Includes student appraisals, marks and other student-centered records for continuing education courses. | School, Learning Services | Hard Copy, Electronic | Event Date + 07 years | September 1 of Grade 12 graduation year | 172, 177, 184 | PIB | Confidential | Destroy | School Files, Division's SIS, PASIprep |
| | SI-07 | Preliminary Assessment / Accommodation | Includes records used prior to a formal assessment, if required. Records may include anecdotal notes, accommodations and interventions used prior to formal assessments and supporting documentation. | School | Hard Copy | Event Date + 03 years | August 31 | Operational Value | PIB | Confidential | Destroy | School Files, Counselors Confidential Files |
| | SI-08 | Registers: Student Enrolment and Attendance | Includes registers and reports concerning the enrolment/attendance of students, recording of daily attendance, and daily absence reports. Also includes class registers for non-school system programs such as continuing education, driver education and heritage language programs. | School, Learning Services | Electronic, Hard Copy | Event Date + 02 years | August 31 | Operational Value | PIB | Confidential | Destroy | Division's SIS, PASIprep |

| Record Series | Record No. | Record Type | Record Type Scope (Description) | Responsible Department | Record Format | Retention | Retention Event Trigger | Retention Value & Legal Citation | PIB | Information Classification | Action to Record after Retention? | Record Location |
|--|------------|---------------------------------------|---|---|-----------------------|------------------------|--|--|-----|----------------------------|-----------------------------------|--|
| | SI-09 | Specialized Assessment: Working Notes | Includes case files referencing students referred for a specialized assessment which may include but is not limited to psychological, learning, speech language, occupational, physical therapy, vision, hearing assessments, testing protocols, authorizations and supporting documentation. Final reports resulting from assessments are placed in the Student Record file. SI-10 - Student Records | School, Student Services | Electronic, Hard Copy | Event Date + 10 years | September 1 of Grade 12 graduation year | Operational Value | PIB | Confidential | Destroy | Student Services Files |
| | SI-10 | Student Records | Includes all information affecting the decisions made about the education of a student. Includes records specified in the Student Record Regulation. This is a provincial record that may be transferred to another board within Alberta as per the Student Record Regulation. If the student leaves the province the records is copied and the copy set is transferred out of province. | School, Learning Services, Records Management | Electronic, Hard Copy | Event Date + 07 years | September 1 of Grade 12 graduation year | 136, 170, 184, 185, 246 Transitory Electronic copies of the records kept on the Division Server are considered transitory; deleted after thirty (30) days with a disposition form. Refer to AP 320 – Student Records | PIB | Confidential | Destroy | Division Server, Division's SIS, PASIprep |
| Division Transport: The function of providing students with transportation. | TR-01 | Bus Drivers | Includes driver licensing, abstracts, training, certifications, route or bus applications, medicals. | Transportation Services | Electronic | Event Date + 04 years | August 31 | 239 | PIB | Confidential | Destroy | Division Approved Transportation Software |
| | TR-02 | Bus Drivers: Logs | Daily logs. | Transportation Services | Hard Copy | Event Date + 06 months | August 31 | 237, 238 | | Internal | Destroy | Individual Contractors Personal Files |
| | TR-03 | Grants | Includes transportation grant applications and supporting documentation. | Transportation Services, Finance | Electronic | Event Date + 07 years | August 31 | 244 | | Internal | Destroy | Records Centre, Division Approved Transportation Software, Division Office |
| | TR-04 | Requests, Complaints and Appeals | Includes records concerning grievances and documentation of complaints or appeals to request Student Bus Services, such as school of choice appeals, yard service appeals, school bus stop complaints, etc. Note: Staff grievances are housed with Personnel Relations - HR-05-01. | Transportation Services | Electronic, Hard Copy | Event Date + 01 year | Complaint / Appeal resolved and decision communicated to complainant | Operational Value | PIB | Confidential | Destroy | Records Centre |
| | TR-05 | Routes | Includes route maps, ECS routes, extra service runs, temporary alternate routes, route optimization, bus passenger lists, and route maintenance requests. | Transportation Services | Electronic | Event Date + 03 years | August 31 | Operational Value | PIB | Internal | Destroy | Records Centre, Division Approved Transportation Software |

| Record Series | Record No. | Record Type | Record Type Scope (Description) | Responsible Department | Record Format | Retention | Retention Event Trigger | Retention Value & Legal Citation | PIB | Information Classification | Action to Record after Retention? | Record Location |
|---------------|------------|--------------------------------------|--|--|-----------------------|------------------------|--|----------------------------------|-----|----------------------------|-----------------------------------|--|
| | TR-06 | Student Bus Services | Includes records concerning transportation/busing for transportation of students to and from schools, Special Education, off site activities, student excursions, and special programs. Records include bus schedules, requests for transportation, bus routes, boundaries and student lists (names and addresses). Excludes: transportation bus costs SEE: AP-561-Student Transportation Boundaries and Fee | Transportation Services, Schools | Electronic | Event Date + 03 years | August 31 | Operational Value | PIB | Internal | Destroy | Division Approved Transportation Software, Division's SIS |
| | TR-07 | Bus Related Student Incident Reports | Documentation relating to behaviour/misconduct. Excludes: Student Accident Reports SEE: LE-01-02 | Transportation Services, Health & Safety, Business & Finance | Electronic, Hard Copy | Event Date + 01 years | August 31 | 245, Operational Value | PIB | Internal | Destroy | Records Centre, Division Approved Transportation Software, |
| | TR-08 | Transportation Reports and Costing | Includes records on bus route costing, fuel rates, bus capacity loading, and records regarding the escalation and de-escalation of fuel prices for vehicles and buses and its impact on the Bus Transportation Contract with the bus line Operators. Excludes: Student Bus Services SEE: TR-06 | Transportation Services | Electronic | Event Date + 03 years | August 31 | Operational Value | | Internal | Destroy | Records Centre, Division Approved Transportation Software |
| | TR-09 | Vehicle Inspections | Includes daily and monthly trip inspection reports | Transportation Services | Hard Copy | Event Date + 06 months | August 31 of inspection report | 237, 238, 242 | | Internal | Destroy | Individual Contractors Personal Files |
| | TR-10 | Vehicle Records | Includes information relating to the vehicle, insurance and registration, copies of purchase invoice, bill of sale, vehicle specifications, modification records (i.e. wheelchair lift installation), maintenance logs, and records pertaining to work performed for upkeep of vehicle, accident reports, repairs, and insurance communication. Excludes: Vehicle Inspections SEE: TR-09 | Transportation Services | Hard Copy | Event Date + 01 years | Life of vehicle, these may be filed by unit number for each vehicle. | 238, 239 | | Internal | Destroy | Individual Contractors Personal Files |