

Records Retention Schedule

Procedure 195: Records and Information Management	
Adopted	October 2008
Last Revised	May 2022
Review Date	May 2027

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
ADM	Associations/ Organizations	Includes reports, newsletters, publications, conference and workshop information and proceedings from organizations to which staff belong.	Originating department	Current + 2 years	Current school or fiscal year						Operational value
ADM	Audio-Visual Services	Includes all records pertaining to bookings, distributions, copying and cataloguing.	Originating department	Current + 2 years	Current school or fiscal year						Operational value
ADM	Forms Inventory	Includes blank copies of forms, kept on file for convenience.	Originating	Superseded + 1 year	Current school or fiscal year					Superseded = retain until a new version replaces the old one	Operational value
ADM	Library Management	Includes records related to board/school library operations. Records include collection inventories, correspondence, acquisition and disposal planning, and strategies, and other records related to library holdings and operations.	Library Services	Superseded + 1 year	Current school or fiscal year		yes			Superseded = when inventories are updated and library weeding out is completed	Municipal Freedom of Information and Protection of Privacy Act Operational value
ADM	Meeting Documentation: Internal	Includes records regarding staff and student council meetings, committee meetings such as principals' council, secretaries' meetings, as well as district principal and subject head meetings. Records include agendas, minutes, reports and resolutions.	Originating department	Current + 4 years	Current school or fiscal year			yes			Operational value
ADM	Meeting Documentation: External	Includes records of external committees and councils on which board and school staff members participate as members. Records include agendas, reports, resolutions and any documentation which reflects obligations of the board.	Originating department	Current + 3 years	Current school or fiscal year						Operational value
ADM	Policing Arrangement	Includes correspondence between schools and police departments regarding extra duty officers, police visits to schools, and related items.	Originating department	Current + 5 years	Current school or fiscal year						Operational value
ADM	Records Destruction Notices	Documentation relating to which records have been destroyed in the normal course of business.	Originating Department	Permanent	Current school or fiscal year	yes				Evidence of application of records program to	Legal value

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
		This includes lists of destroyed records and forms authorizing the destruction of records.	Freedom of Information Coordinator							support litigation if required.	
ADM	Records Management and Listing Reports	Includes information regarding the management of records, regardless of medium. Records include Classification Scheme, file lists, lists of records in storage, records management reports and related correspondence.	Freedom of Information Coordinator	Superseded + 1 year	Current school or fiscal year	yes				Superseded = replace when new reports are received	Legal value
ADM	Requests for Information	Includes requests and tracking sheets for Freedom of Information Requests made under the Municipal Freedom of Information Act and requests for access to student/employee records and information.	Freedom of Information Coordinator	Event + 2 years	Current school or fiscal year		yes			Event = final resolution of request or appeal if applicable	Legal and operational value
ADM	Service Requisitions and Reports	Includes records relating to translation, duplicating/ printing services and mail/courier and delivery services. Records include requisitions and memos for services, confirmations and service logs/reports, correspondence, reports.	Originating department	Current + 2 years	Current school or fiscal year						Operational value
ADM	Vendors, Suppliers Contractors	Includes information about vendors, contractors and suppliers and their goods and services. Records include catalogues, price lists and correspondence. This excludes agreements and purchasing documentation.	Originating department	Superseded + 1 year	Current school or fiscal year					Superseded = replace when new documentation is received from suppliers	Operational value
COM	Advertisements	Includes publications, artwork and copies of advertisements placed by the board or schools.	Originating department	Current + 4 years	Current school or fiscal year			Yes			Operational value
COM	Appreciation and Commendations	Includes general commendations, certificates of appreciation and petitions received from the general public and parents.	Originating department	Current + 1 year	Current school or fiscal year						
COM	Communication	Includes memos, brochures, correspondence and related information about programs and activities sponsored by the board	Originating department	Current + 2 years	Current school or fiscal year			Yes			Operational value

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
		or by schools.									
COM	Complaints	Includes records related to general complaints about the board/schools and its activities. Includes correspondence, investigations, findings and related reports regarding resolution. Complaints about a specific project or program may be contained within the program. Excludes complaints specific to an individual student or staff member; see case files.	Originating department	Event + 1 year	Current school or fiscal year		yes			Event = resolution of complaint	Municipal Freedom of Information and Protection of Privacy Act
COM	Contacts and Mail Listings	Includes lists of individuals or organizations with whom the board and school communicate. Records include mailing lists, emergency contact lists, student lists.	Originating department	Superseded	Current school or fiscal year		yes			Superseded = replace when new lists are updated	Municipal Freedom of Information and Protection of Privacy Act Operational value
COM	Events, Ceremonies and Celebrations	Includes 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, etc.). Records include program schedules, correspondence, brochures, and event activity details.	Originating department	C + 4	Current school or fiscal year			Yes			Operational value
COM	Media Relations, Communications and News Releases	Includes records regarding board relations with the various media. Includes press releases and information releases, speeches, photographs, correspondence.	Originating department	Current + 4 years	Current school or fiscal year			yes			Operational value
COM	Memorabilia	Includes school/board memorabilia, collectibles and other historical items that reflect the individual nature of the schools, such as informal school and board histories, school logos and crests, songs.	Originating department	C + 4	Current school or fiscal year			yes		The Board does not maintain a separate historical collection and will deem items listed as permanent retention	Education Act Historical value
COM	Multimedia Materials	Includes photographs, slides, videotapes, CDs, DVDs, recordings, etc. that document	Originating department	Permanent				yes		The Board does not maintain a separate historical collection	Education Act Historical value

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
		school and board activities.								and will deem items listed as permanent retention	
COM	News Reports	Includes news reports from newspapers, magazines, websites and other publications regarding the board and school, staff, students and trustees.	Originating department	Permanent	Current school or fiscal year			yes		The Board does not maintain a separate historical collection and will deem items listed as permanent retention	Education Act Historical value
COM	Publications: Internal	Includes records and artwork for publications such as yearbooks, curriculum handbooks, school handbooks, school calendars, Welcome to High School booklets, annual reports, brochures on programs offered by schools, newsletters, and other school promotions.	Originating department	Permanent	Current school or fiscal year		yes	yes		The Board does not maintain a separate historical collection and will deem items listed as permanent retention	Municipal Freedom of Information and Protection of Privacy Act Education Act Historical value
COM	Speeches and Presentations	Includes speeches and presentations delivered by board and school staff, elected officials and teachers covering non-classroom topics.	Originating department	Permanent	Current school or fiscal year			yes		The Board does not maintain a separate historical collection and will deem items listed as permanent retention	
COM	Websites	Includes snapshots of website content and copies of web pages created by school boards for general public use. Includes board and school sites.	Originating department	Permanent	Current school or fiscal year			yes		The Board does not maintain a separate historical collection and will deem items listed as permanent retention	
FAC	Audio Visual Services	Includes records pertaining to equipment repair.	Originating department	Current + 2 years	Current school or fiscal year						Operational value
FAC	Building and Site Approvals	Includes documentation such as site plan approvals, building permits, Life Safety Plan and municipal reports pertaining to the approval of building plans by the municipality, Fire Marshal's Office, Ministry of Education, Ministry of Health, and other government bodies.	Facility Services	Event + 6 years	Current school or fiscal year					Event = as long as the building remains board property	Building Code Act Fire Protection and Prevention Act Technical Standards and Safety Act Operational value Legal value

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
FAC	Confined Spaces	Includes records relating to the assessment of confined spaces and written plan and procedures for the control of hazards in confined spaces.	Facility Services	Superseded + 1 year	Current school or fiscal year					Superseded = replace when the record was first created Retain until new procedures replace the current one	Occupational Health and Safety Act
FAC	Designated Substance and Hazardous Material Monitoring: Hazardous, Biological, Chemical or Physical Agents	Includes records regarding the monitoring of hazardous chemical and physical agents and designated substances in accordance with the Occupational Health and Safety Act. Includes air quality reports. Excludes exposure records of workers.	Facility Services	Current + 5 years	Current school or fiscal year						Occupational Health and Safety Act
FAC	Designated Substance and Hazardous Materials, Waste monitoring and Management	Includes records related to the management and disposal of chemical, biological or physical agents or substances.	Facility Services	Current + 4 years	Current school or fiscal year						Occupational Health and Safety Act Operational value
FAC	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.	Facility Services	Event + 15 years	Current school or fiscal year	ye		yes		Event = as long as the building remains board property	Real Property Limitations Act
FAC	Emergency Plans	Includes records regarding emergencies and related plans to support the board, school in case of fire or emergencies. Records include emergency plans, business continuity plans, call lists, supplier/vendor contacts, and related reports.	Facility Services and Schools	Superseded + 5 years	Current school or fiscal year	yes		yes		Superseded = replace when old plans are replaced with new plans	Operational value
FAC	Facilities and Construction Projects	Includes budgets, estimates, project plans and schedules, progress reports, project meeting minutes, certificates of clearance,	Facility Services	Event + 6 years	Current school or fiscal year					Event = upon completion of the project	Building code Act Fire Protection and Prevention Act

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
		project drawings and correspondence regarding the building of schools and other properties.									Technical Standards and Safety Act
FAC	Facilities Planning	Includes records regarding the allocation of classroom and workspace to staff and students. Records include correspondence, proposed enrolment studies and reports, facilities use plans, facilities designs and layouts, furniture layouts.	Facility Services	Current + 5 years	Current school or fiscal year						Operational value
FAC	Health and Safety Committee	Records include reports, correspondence, minutes of health and safety committee meetings, notices, correspondence and reports.	Schools/ Originating department	Current + 4 years	Current school or fiscal year						Occupational Health and Safety Act Legal value
FAC	Incident Reports: Health and Safety	Includes general records relating to incidents that affect health and safety of staff and/or students, e.g., emergency response, school illness, infections, quarantines, etc. Records include reports, correspondence and summaries and information related to actions taken by staff. Excludes medical health records.	Facility Services/ Originating department	Event + 6 years	Current school or fiscal year					Event = resolution of issue	Occupational Health and Safety Act
FAC	Inspections: General	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 water flushing logs, water testing reports, elevator logs, sanding and salting logs, playground equipment inspections logs, chemical treatment log, underground storage tank inspections, playground inspections, physical education equipment inspections, technical program equipment, etc.	Facility Services	Event + 6 years	Current school or fiscal year					Event = date of inspection or test. Ensure that at least current and preceding reports are retained	Fire Protection and Prevention Act Safe Drinking Water Act Technical Standards and Safety Act
FAC	Inspections: Fire Protection Equipment	Includes records regarding the inspection and testing of	Facility Services	Event + 2 years	Current school or fiscal year					Event = the date the equipment was	Fire Protection and Prevention Act

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
	and Emergency Power Systems	emergency power systems, fire extinguishers and fire protection systems.								purchased	
FAC	Land Surveys	Includes land survey information such as legal property surveys, construction layout and control surveys, and field notes. Also includes soil-boring reports.	Facility Services	Superseded - Permanent	Current school or fiscal year			yes		Superseded = retain until a new version replaces the old one Note: Ensure land surveys are available at the local registry office before destruction	Operational value
FAC	Maintenance and Operations: Buildings, Physical Plant, Equipment	Includes records related to support the maintenance and operations of buildings, physical plant and equipment.	Facility Services	Event + 3 years	Current school or fiscal year					Event = the disposal of the property or equipment.	Fire Protection and Prevention Act Technical Standards and Safety Act
FAC	Maintenance and Operations: Grounds	Maintenance requisitions, work orders, logs and reports showing action taken re: grounds keeping, snow clearance, and cleaning.	Facility Services	Current + 3 years	Current school or fiscal year						Operational value
FAC	Material Safety Data Sheets	Includes material safety data sheets as created and issued by the manufacturer.	Facility Services Originating department	Event + 3 years	Current school or fiscal year					Event = creation or revision of the MSDS Note: Every location that uses the material must retain a copy of the data sheet.	Occupational Health and Safety Act
FAC	Permits/Facility Bookings	Includes copies of permits issued by the board for the use of school property for purposes such as polling stations and community events. Also includes applications for permits, lists of permit holders and inter-jurisdictional permits.	Originating department	Current + 5 years	Current school or fiscal year					Operational value	Operational value
FAC	Security	Includes records regarding the security of office and school facilities and properties such as control of keys, trespassing, surveillance reports, emergency telephone numbers/contacts, and police station locations. Also includes school visitor book and	Facility Services Originating department	Superseded + 2 years	Current school or fiscal year		yes			Superseded = retain until a new version replaces the old one	Education Act Municipal Freedom of Information and Protection of Privacy Act

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
		contractor logs, etc.									
FAC	Vehicles/Fleet Management	Includes records of all vehicles currently owned, operated and maintained by the board.	Facility Services	Event + 2 years	Current school or fiscal year					Event = disposal of vehicle	Compulsory Automobile Insurance Act Limitations Act
FIN	Accounts Payable	Includes records documenting funds payable such as legal fees, tuitions fees, trustee and employee expenses, vendor transaction listings, payment vouchers, cheque requisitions, gas, hydro and phone bills, petty cash disbursements. Staff and board expenses.	Finance	Current + 6 years	Current school or fiscal year		yes			Please note may contain Personal Information	Excise Tax Act Income Tax Act-R.S.O. Income Tax Act-R.S.C. Electronic Commerce Act Municipal Freedom of Information and Protection of Privacy Act
FIN	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	Current + 6 years	Current school or fiscal year	yes					Excise Tax Act Income Tax Act-R.S.O. Income Tax Act-R.S.C. Electronic Commerce Act
FIN	Audits Financial	Includes records regarding internal and external financial audits of accounts.	Finance	Current + 6 years	Current school or fiscal year	yes					Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act
FIN	Banking and Cash Management	Includes records regarding banking transactions and relationships with banks. Includes bank statements, bank reconciliations, deposit records, cancelled cheques, cheque stubs	Finance/ Originating department	Current + 6 years	Current school or fiscal year	yes					Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
		and money order rates. Includes petty cash bank statements, which schools retain.									R.S.O.Electronic Commerce Act
FIN	Budgets	Includes departmental and board budgets, both capital and operating. Includes all working notes, budget formula calculations, current estimate highlights, preliminary formula budget calculation sheet summaries, and budgeted vs. actual reports.	Finance	Current + 6	Current School or Fiscal year						Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act
FIN	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	Current + 6 years	Current school or fiscal year					Event = completion of project	Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act
FIN	Capital Revenue	Includes records related to capital revenue from sale of property and rental income from leased premises and other sources.	Finance	Current + 6 years	Current school or fiscal year	yes					Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act
FIN	Financial Forecasts and Reports	Includes records relating to general ledger balancing, including GL reports, variance reports, yearly schedule, and variance report changes.	Finance	Current + 6 years	Current school or fiscal year						Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act
FIN	Financial Statements	Includes the balance sheet, income statement, statement of source and application of funds,	Finance	Permanent	Current school or fiscal year	yes					Excise Tax Act Income Tax Act-

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
		and other audited financial statements.									R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act
FIN	Financial Work Papers	Includes all drafts, grant calculations and other working papers associated with the development of financial statements.	Finance	Current + 6 years	Current school or fiscal year						Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act
FIN	Funding: Assessments	Includes records relating to the direction of school support, levies and related assessments. Also includes information on fee-paying, non-resident and international visa students.	Finance	Current + 6 years	Current school or fiscal year						Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act
FIN	Funding: External Sources	Records relate to bequests and donations, grants, funding and subsidies, including Ministry of Education and other governments, such as TPAs, ISA claims, Section 27, PRO Grants. Records include correspondence, background information and supporting documentation.	Finance/ Originating department	Event + 6	Event + 1	yes				Event = winding up of fund/bequest or expiry of grant period	Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act Education Act
FIN	Funding: School Councils	Includes records on funds allocated to or raised by the school council. Records consist of accounts receivable and payable documents, such as invoices and vouchers.	School/ Originating department	Current + 6 years	Current school or fiscal year	yes					Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
											R.S.O. Electronic Commerce Act
FIN	Funding: Student Generated Funds	Includes records on funds allocated to or raised by the student council/school. Records include accounts receivable and payable documents such as invoices and vouchers and fund raising collection envelopes (KEV).	School/ Originating department	Current + 6 years	Current school or fiscal year	yes					Excise Tax Act Income Tax Act- R.S.C. Income Tax Act- R.S.O. Electronic Commerce Act
FIN	Funding: Charitable Organizations	Includes records regarding fundraising for charitable organizations. Records include completed contribution forms, promotional materials for fundraising and reports.	Originating department	Current + 6 years	Current school or fiscal year	yes					Excise Tax Act Income Tax Act- R.S.C. Income Tax Act- R.S.O. Electronic Commerce Act
FIN	Income Tax Returns	Records relating to federal and provincial income tax returns, including signed income tax returns and supporting documents submitted to federal and provincial tax agencies.	Finance	Permanent	Current school or fiscal year						Excise Tax Act Income Tax Act- R.S.C. Income Tax Act- R.S.O. Electronic Commerce Act
FIN	Insurance Policies	Records relating to policies to cover loss or damage to property or premises and to cover staff and general public against injury or death resulting from accidents on school/board premises, or occurring during employment. Records include insurance policies, documentation regarding the annual review of insurance policies, certificates, appraisals and related correspondence.	Finance / Originating department	Superseded + 2 years	Current school or fiscal year					Superseded = retain until a new version replaces the old one	Limitations Act
FIN	Inventory Control: Fixed Assets	Records relating to the balance sheet, including fixed asset	Finance	Permanent	Current school or fiscal year	yes				Event = disposal of asset	Excise Tax Act

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
		listings, depreciation details, asset transfer information, and details of extraordinary entries.									Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act
FIN	Inventory Control: Non-Fixed Assets	Includes all records regarding inventories of board-owned equipment.	Finance	Current + 6 years	Current school or fiscal year						Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act
FIN	Investments	Includes records regarding the board's investments, term deposits and promissory notes. May also include records of investments in fuel for later sale to individual schools and other organizations involved in the bulk purchase. Includes records regarding the debentures and bonds issued.	Finance	Current + 6 years	Current school or fiscal year	yes				Event = after closure of account, redemption of issue	Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act
FIN	Journal, Vouchers and Entries	Includes completed journal voucher forms, input forms and all background documentation used to substantiate journal entries.	Finance	Current + 6 years	Current school or fiscal year						Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act
FIN	Ledgers: General	Includes all records in the books of original entry, whether maintained in book format or as a computer report.	Finance	Permanent Retain for the life of the board	Current school or fiscal year	yes				Current = retain for the school or fiscal year	Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O.

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
											Electronic Commerce Act
FIN	Ledgers: Subsidiary 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	Current + 6 years	Current school or fiscal year						Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act Limitations Act Real Property Limitations Act
FIN	OnSIS Reporting	Includes all counts and projections documenting enrolments in the school system and statistical reports required by the Ministry of Education as part of the funding process for the preparation of educational statistics.	Finance	Current + 6 years	Current + 1 year (paper copies for Ministry of Education audit purposes)			yes			Operational value Legal value
FIN	Payroll Management	Includes all records of payments of salary, wages and deductions to employees. Includes payroll master cards, time sheets, direct deposit request forms, payroll update logs, holdbacks, and payroll deduction and billing reports. Also includes T4s, TDs, and ROEs.	Finance	Current + 6 years	Current School or Fiscal year	yes					Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act
FIN	Pension Contributions and Support	Includes contribution cards detailing pension and benefits obligations due to retired employees under OMERS and other annuity or superannuation plans (TPP). Includes payroll records required to determine and verify pension payments.	Finance	Current + 6 years	Current school or fiscal year	yes				Event = until pension is paid out to all beneficiaries	Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act
FIN	Pension Plans	Includes general information on	Finance	Superseded	Current school or					Superseded = retain	Excise Tax Act

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
		OMERS, TPP and other annuity or superannuation plans and annual information returns.		Retain for the life of the board	fiscal year					until a new version replaces the old one	Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act
FIN	Purchasing Documentation	Records supporting purchases made by the school/board. Includes 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	Current + 6 years	Current school or fiscal year	yes					Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act
FIN	Sales and Property Tax Return Reports	Includes records documenting taxation, such as gas surtax reports, income tax returns and federal sales tax tables. Also includes Harmonized Sales Tax returns and requests for rebate.	Finance	Current + 6 years	Current school or fiscal year						Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act
FIN	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.	Originating department	Current +6 years	Current school or fiscal year						Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act
GOV	Appointments: Board and Committee	Includes records on recommendations made by the board regarding appointments to other local boards, such as the library board, board solicitors, banking authority and auditor.	Board Secretary	Event + 1 year	Current school or fiscal year			yes		Event = expiry of term of office	Education Act

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
GOV	Articles of Incorporation, By-laws and Constitution	Includes records related to the operation of the school board and capture details about the legal entity.	Board Secretary	Permanent	Current school or fiscal year			yes			Education Act Business Commerce Act
GOV	Audits: Programs	Includes audits of programs, curriculum plans, and related board and school activities undertaken by the Ministry of Education.	Originating department	Current + 6 years	Current school or fiscal year						Education Act
GOV	Guidelines, Policies and Directives: External	Includes documentation about initiatives and guidelines provided by the Ministry of Education. Records include memoranda, directives, and correspondence such as the OSR Guideline, Safe Schools Guidelines and Ministry of Education Policy/Program Memoranda.	Board Secretary	Superseded + 3 years	Current school or fiscal year					Superseded = when policies and directives are replaced Board/school can obtain old copies from Ministry, if required	Education Act
GOV	Guidelines, Policies and Directives: Internal	Includes records relating to board and school operating practices and activities, policy and procedure manuals, guidelines and directives, and all other policies and procedures established by the board, departments and schools, such as accounting, emergency and evaluation procedures, records management, personnel, and attendance reporting procedures.	Originating department	Superseded + 1 year Permanent retention	Current school or fiscal year			yes		Superseded = when policies and procedures are replaced Core records show evolution of school/board	Education Act Occupational Health and Safety Act Fire Protection and Prevention Act Excise Tax Act
GOV	Intergovernmental Reporting and Communication	Includes correspondence and reports between the board and various levels of government such as the municipality and provincial ministries. (e.g., Ministry of Education school year calendar, textbook approval). Also includes correspondence and information on other school boards.	Originating department	Current + 6 years	Current school or fiscal year			yes			Education Act
GOV	Meetings: Board of Trustees	Includes agenda and related reports meetings, working notes used in agenda preparation, minutes, resolutions and meeting briefs.	Board Secretary	Permanent retention	Current school or fiscal year			yes			Education Act

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
GOV	Meetings: Governance Committees and Councils	Includes agenda and minutes of school board standing, advisory and ad hoc committees (e.g., SEAC, PIC). May include Administrative Council, Directors' Council; task forces; Employee Assistance Program, Safe Schools, etc.	Board Secretary	Permanent retention	Current school or fiscal year			yes			Education Act
GOV	Meetings: School Council	Includes agenda and minutes of meetings.	School (Principal)	Current + 6 years	Current school or fiscal year						Education Act
GOV	Organization Structure	Includes records regarding reporting relationships, organization structure, organization analysis, etc. For both schools and school boards. Includes organizational charts and school profiles.	Originating departments	Superseded + 4 years	Current school or fiscal year			yes		Superseded = when organization structure changes	Education Act
GOV	Strategic Planning	Includes all strategic and operational planning documents, and mandates, as well as related correspondence and background and reference information.	Originating department	Superseded + 2 years	Current school or fiscal year			yes		Superseded = retain until a new version replaces the old one Permanent retention of the strategic planning document	Operational value
GOV	Trustee Management	Includes clerk's certificate, elections information, personal information, CASL forms (Canada's Anti-Spam Legislation), directories, vacancies and appointments and news items regarding the trustees. Also includes trustees' distribution and orientation information.	Board Secretary	Event + 2 years	Current school or fiscal year		yes	yes		Event = expiry of term of office	Education Act Municipal Freedom of Information and Protection of Privacy Act Municipal Elections Act
HUM	Attendance Employees	Includes records regarding employee attendance, absences (leaves and sabbaticals) and vacations. Records include details about vacation schedules, hours of work, absenteeism reports and related reports from the Human Resource information systems.	Human Resources	Event + 3 years	Current school or fiscal year		yes			Event = date record was created	Municipal Freedom of Information and Protection of Privacy Act Employment Standards Act

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
HUM	Criminal Background Checks and Declarations: Staff	Includes records listing any criminal code convictions that have not been pardoned for all existing and new employees. Includes annual offence declaration.	Human Resources	Event + 10 years Declarations: Superseded	Current school or fiscal year		yes			Event = termination of employment or six years without an offence declaration for volunteers	Municipal Freedom of Information and Protection of Privacy Act Education Act
HUM	Criminal Background Checks and Declarations: Volunteers	Includes records listing any criminal code convictions that have not been pardoned for all existing and new service providers and volunteers that come into direct contact with students on a regular basis. Includes annual offence declaration.	School	Background Checks: Event + 6 years Declarations: Superseded	Current school or fiscal year		yes			Superseded = retain until a new version replaces the old one	Municipal Freedom of Information and Protection of Privacy Act Education Act
HUM	Employee Benefit Plan	Includes brochures, rates, quotes, correspondence and explanatory documents regarding benefits offered to employees, such as group insurance, dental plans, benefit rate changes and premium adjustments.	Finance	Superseded + 1 years	Current school or fiscal year					Superseded = retain until a new version replaces the old one	Operational value
HUM	Employee Claims	Includes records pertaining to long-term and short-term disability and workplace accommodations.	Human Resources	Event + 10 years	Current school or fiscal year		yes			Event = when claim is settled	Limitations Act Municipal Freedom of Information and Protection of Privacy Act Occupational Health and Safety Act Workplace Safety and Insurance Act
HUM	Employee Incident and Accident Reports	Includes reports of accident/injury to board employees under the Workplace Safety and Insurance Act and designated substances exposure records under the Occupational Health and Safety Act. Records may include doctor's notes, follow-up notes and related correspondence, and short-term and long-term disability claims for both teaching and support staff and record of administration of first aid.	Human Resources	Event + 10 years	Current school or fiscal year		yes			Event = when claim is settled Note: if it is believed that the event might reoccur past 7 years retain until retirement + 7 years	Limitations Act Municipal Freedom of Information and Protection of Privacy Act Occupational Health and Safety Act Workplace Safety and Insurance Act

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
HUM	Employee Records	Includes records regarding the employment history of the board or school employees. Includes initial resume and applications, internal applications, benefit enrollment forms, salary calculation forms, change advice, employee master record cards, certification of level placement, probationary contract, key tasks, and employee verification forms. Includes teaching and support staff.	Human Resources	Event + 10 years	Current school or fiscal year	yes	yes			Event = termination of employment	Limitations Act Municipal Freedom of Information and Protection of Privacy Act Occupational Health and Safety Act Workplace Safety and Insurance Act
HUM	Employee Surveys	Includes surveys and research conducted on board staff regarding issues and planning that affect them.	Human Resources	Superseded + 1 year	Current school or fiscal year		yes			Superseded = when survey is updated	Municipal Freedom of Information and Protection of Privacy Act
HUM	Employment Equity Program	Includes records and historical information regarding employment equity.	Human Resources	Event + 3 years	Current school or fiscal year		yes	yes		Event = termination of the plan	Municipal Freedom of Information and Protection of Privacy Act
HUM	Human Resources Planning	Includes records of succession planning, staff allocations, staff turnover, staff mobility, promotions, transfers and related records.	Human Resources	Current + 7 years	Current school or fiscal year		yes				Municipal Freedom of Information and Protection of Privacy Act
HUM	Job Descriptions	Includes job descriptions and specifications, as well as background information used in their preparation or amendment. Also includes positions of responsibility.	Human Resources	Superseded + 2 years	Current school or fiscal year			yes		Superseded = when new job descriptions are created	Operational value
HUM	Labour Relations	Includes records regarding the administration and interpretation of the board's collective agreements and includes seniority lists, implementation plans, sub plans, and related records. Also includes records related to collective bargaining, e.g., final offers, memoranda of settlement, mediations, arbitrations and scatter grams used in preparation for bargaining. Also includes records regarding grievances filed by	Human Resources	Event + 10 years	Current school or fiscal year					Event = termination of contract period; seniority lists until suspended	Operational value

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
		employees, such as evaluation reports, notifications, correspondence with unions concerning grievance initiators, and legal opinions. Excludes collective agreement.									
HUM	Labour Relations: Employee Relations	Includes records regarding employee misconduct, investigations, notes correspondence, discipline and counseling.	Human Resource	Event + 10 years	Current school or fiscal year		yes			Event = once resolution of the event is completed	Limitations Act Municipal Freedom of Information and Protection of Privacy Act
HUM	Labour Relations: Union Certification	Includes original documents concerning the certification of labour unions.	Human Resource	Permanent retention	Current school or fiscal year						Legal value
HUM	Medical Records: Employee	Includes doctor's notes, correspondence and health reports related to an employee's medical situation.	Human Resource	Event +10 years	Current school or fiscal year		yes			Event = once an event or action occurs Note: Maintain confidentiality and limit access	Municipal Freedom of Information and Protection of Privacy Act
HUM	Medical Records: Employee Hazardous Material Exposure	Records of exposure to asbestos and other hazardous materials.	Human Resource	Event + 20 years	Current school or fiscal year		yes			Event = last record made	Municipal Freedom of Information and Protection of Privacy Act Occupational Health and Safety Act
HUM	Pay Equity	Includes records regarding the establishment and implementation of the board's pay equity plan. Records include background information, consultant information, questionnaires, interview documentation and job evaluation plans, job classification schemes	Human Resource	Superseded + 5 years	Current school or fiscal year					Superseded = retain until a new version replaces the old one	Operational value
HUM	Performance Appraisals	Includes records of job performance appraisals on all employees according to established timelines and criteria through board procedures.	Human Resources	Event + 10 years	Current school or fiscal year		yes			Event = date of appraisal	Municipal Freedom of Information and Protection of Privacy Act Education Act
HUM	Professional	Includes records relating to	Human	Current + 1	Current school or					Current = retain for	Municipal Freedom of

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
	Development Participation	invitations, approvals and registrations for internal and external training events, seminars and workshops.	Resources	year	fiscal year					the current school or fiscal year	Information and Protection of Privacy Act
HUM	Professional Development Programs and Materials	Includes records regarding courses and conferences facilitated by the board for staff development and information on career and professional development programs. Also includes conference proceedings and presentations, orientation materials and staff development calendars.	Human Resources	Current + 5 years	Current school or fiscal year			yes			Operational value
HUM	Recruitment and Hiring	Includes records regarding the recruitment of staff. Includes job postings, copies of advertisements, competitions and resumes of candidates selected for interviews.	Human Resources	Event + 1 year	Current school or fiscal year			yes		Event = date of posting Note: Only retain files for people interviewed	Operational value
HUM	Resume 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.	Human Resources	Event + 6 months	Current school or fiscal year		yes			Event = decision regarding hiring or not Resume is transferred to employee file upon hiring	Municipal Freedom of Information and Protection of Privacy Act
HUM	Salary Administration	Includes records regarding the planning and scheduling of salaries, such as salary surveys and schedules, salary increments, service pay and substitution pay.	Human Resources	Superseded + 1 year	Current school or fiscal year					Superseded = retain until a new version replaces the old one	Operational value
HUM	Staff Awards, Certificates and Bursaries	Includes records relating to special recognition and awards presented to staff.	Human Resources	Current + 2 years	Current school or fiscal year		yes			Current = retain for the current school or fiscal year Subject to inclusion in employee records	Municipal Freedom of Information and Protection of Privacy Act
HUM	Staff Listings and Directories	Records includes listing of supply teachers, retirement lists, seniority lists and staff listing.	Human Resources	Superseded + 1 year	Current school or fiscal year	yes	yes			Superseded = retain until a new version replaces the old one	Municipal Freedom of Information and Protection of Privacy Act

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
HUM	Temporary Resourcing	Includes correspondence, requests for temporary help, lists of floater secretaries/supply teachers, etc.	Human Resources	Superseded + 1 year	Current school or fiscal year	yes	yes			Superseded = retain until a new version replaces the old one	Municipal Freedom of Information and Protection of Privacy Act
HUM	Training: Legislated	Includes records related to staff training mandated by legislation or board policy including confined space general and specific training, WHMIS training, etc.	Human Resources	Superseded + 4 years	Current school or fiscal year		yes			Superseded = retain until a new version replaces the old one Subject to inclusion in employee records	Operational value Municipal Freedom of Information and Protection of Privacy Act
HUM	Training: Non-legislated	Includes records related to staff training which are not mandated by legislation but documented. These records may include behavior management training, internal staff training etc.	Human Resources	Event + 4 years	Current school or fiscal year		yes			Event = once the event or action occurred Subject to inclusion in employee records	Operational value Municipal Freedom of Information and Protection of Privacy Act
HUM	Volunteers	Includes records of volunteer programs, such as recruitment workshops, annual receptions and volunteer activities in schools. Records include volunteer guidelines, correspondence and volunteer program details.	Schools	Superseded + 1 year	Current school or fiscal year			yes		Superseded = retain until a new version replaces the old one	Municipal Freedom of Information and Protection of Privacy Act
ICT	Access Controls and Password Records	Records related to the management of and access to programs. Also includes individual access, password management.	ICT	Event + 1 year	Current school or fiscal year		yes			Event = termination of employee	Operational value
ICT	Computer System Design and Architecture	Records relating to the design of computer systems and/or software, including needs assessments, business cases, process flowchart documentation, 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. Also	ICT	Event + 2 years	Current school or fiscal year					Event = life of the system	Operational value

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
		includes requests for significant modification, fixes and upgrades.									
ICT	Information Systems Production Activity and Control Files	Records relating to computer system operations and backup information. Also includes activity logs, trouble tickets, change control sheets, change orders, file access control reports, system changes and mainframe access forms.	ICT	Superseded + 1 year	Current school or fiscal year					Superseded = retain until a new version replaces the old one	Operational value
ICT	Telecommunication Systems	Records relating to the management and maintenance and use of telecommunications equipment. Also includes system documentation, configuration details and services provided.	ICT	Event + 3 years	Current school or fiscal year					Event = life of the system	Operational value
LEG	Accident/Incident Claims and Reports	Includes reports related to student accidents that occur on board 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. Includes reports to Ontario School Board Insurance Exchange. Excludes claims/litigations, WSIB claims/ reports.	School/Finance /OSBIE	Event + 3 years	Current school or fiscal year		yes			Event = once the accident/incident has been resolved If applies to student, keep until student is age 18 plus 2 years	Municipal Freedom of Information and Protection of Privacy Act
LEG	Acts and Legislation	Includes single copies of Acts and Regulations, bills and judgments relevant to the board's activities, as well as correspondence and discussion papers concerning the Acts and Regulations and amendments to them.		Superseded + 1 year	Current school or fiscal year					Superseded = retain until a new version replaces the old one	Operational value
LEG	Appeals and Hearings	Includes records of hearings conducted regarding issues that affect the school/board. Records include correspondence, reports, discovery findings, hearing proceedings and final decisions.	Originating department	Event + 5 years	Current school or fiscal year		yes			Event = final resolution of the dispute	Limitations Act Municipal Freedom of Information and Protection of Privacy Act
LEG	Claims and Litigations	Includes all liability claims and litigation against or entered into	Originating department	Event + 5 years	Current school or fiscal year		yes			Event = resolution of claim	Limitations Act

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
		by the boards and schools. Records include reports, correspondence, investigations, etc.									
LEG	Contracts and Agreements	Correspondence and information related to contracts and agreements.	Originating department	Event + 6 years	Current school or fiscal year			yes		Event = expiry of agreement or contract	Limitations Act
LEG	Deeds and Titles	Includes original deeds to any board-owned property.	Originating department	Permanent retention							Real Property Limitations Act
LEG	Legal Opinions/Precedent	Records relating legal opinions and precedents about legal issues identified by the school/board. Records include case law, correspondence, reports, and findings/opinions provided to requestor.	Originating department	Event + 1 year	Current school or fiscal year					Event = completion of issue	Operational value
LEG	Property Acquisition and Sales	Includes land purchase agreements, development agreements, property appraisals, valuations and quotes concerning land owned by the board or under consideration for purchase. Also includes plans, correspondence, reports and backup documentation relating to the acquisition or sale of lands.	Originating department	Event + 20 years	Current school or fiscal year					Event = disposal of property	Real Property Limitations Act
LEG	Property Damage/Trespassing Reports	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	Event + 5 years	Current school or fiscal year		yes			Event = date of damage	Real Property Limitations Act Municipal Freedom of Information and Protection of Privacy Act
LEG	Transportation Accidents	Includes reports and general correspondence relating to accidents. Also includes accident reports and follow-ups, as well as bus accident communication notes.	Originating department	Event + 5 years	Current school or fiscal year					Event = date of damage	Municipal Freedom of Information and Protection of Privacy Act Limitations Act
PDD	Outlines/Courses of Study	Includes outlines of available programs and courses of study.	Curriculum	Superseded + 3 years	Current school or fiscal year			yes		Superseded = retain until a new version replaces the old one	Copyright Act
PDD	Program Development and Design	Includes proposals, correspondence and curriculum development materials, including	Curriculum	Superseded + 3 years	Current school or fiscal year					Superseded = retain until a new version replaces the old one	Copyright Act Education Act

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
		writing projects teaching units, lesson plans, blank examinations, testing ideas, songs, games, music sheets and other learning materials.									
PDD	Program Planning	Includes proposals for new curriculum program, either system-wide or at the school level. Includes meeting notes and reports. Also includes material regarding comparisons with programs in other school boards, provinces and countries. Includes program review reports and other valuations of specific programs in the curriculum. Also includes EQAO.	Curriculum	Event + 3 years	Current school or fiscal year					Event = last Ministry of Education review or audit	Education Act
PDD	Program/Curriculum Guidelines	Includes Ministry of Education and board guidelines, directives, approved texts and software lists, and related correspondence concerning the provision of specific programs in the curriculum (e.g., JK/SK, French Immersion).	Curriculum	Superseded + 3 years	Current school or fiscal year			Yes		Superseded = retain until a new version replaces the old one	Copyright Act Education Act
PDD	Programs and Services: Community	Includes records for Education Week, summer arts camp, mentorship for immigrants, community use of schools, day care services and safety and awareness programs. Also includes program reviews and reports of the activities of community liaison officers.	Originating department	Current + 4 years	Current school or fiscal year			yes		Current = retain for the current school or fiscal year	Operational value
PDD	Programs: Continuing Education	Includes objectives, lesson units, principal reports, program reviews, teaching materials and related records used in continuing education programs, such as heritage awareness, second language, multicultural, seniors programs.	Curriculum	Superseded + 3 years	Current school or fiscal year			yes		Superseded = retain until a new version replaces the old one	Operational value
PDD	Programs: Driver Education	Includes program outlines and correspondence concerning education in the safe operation of	Curriculum	Event + 1 year	Current school or fiscal year					Event = completion of the program	Municipal Freedom of Information and Protection of Privacy

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
		motor vehicles.									Act
PDD	Programs: Parks and Recreation	Includes correspondence and records of programs, such as swimming and fitness made available through municipal Parks and Recreation or the YMCA.	Curriculum	Current + 1 year	Current school or fiscal year						Operational value
RPL	Planning: 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	Superseded Retain Permanently	Current school or fiscal year			yes		Retain all copies permanently Archival value Operational value	Education Act Operational value
RPL	Planning: 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, Ontario population reports, and traffic studies.	Originating department	Current + 4 years	Current school or fiscal year					Operational value	Operational value
RPL	Reference Materials	Includes information gathered as background data to support research and other activities within the board and the school. Information may include articles, white papers, research reports, and information from other schools and boards.	Originating department	Superseded + 2 years	Current school or fiscal year					Superseded = retain until a new version replaces the old one	Operational value
RPL	Research Data and Work Papers	Includes records of any data, work papers conducted for research, including reports and activities.	Originating department	Event + 3 years	Current school or fiscal year					Event = completion of research project	Operational value
RPL	Research Projects: Curriculum/Program	Includes records of any research conducted into curriculum or program development, such as questionnaires, interest surveys and independent research studies.	Originating department	Event + 5 years	Current school or fiscal year			yes		Event = completion of project	Operational value
RPL	Research Projects: School System	Includes records relating to internal and external research. Records include applications,	Originating department	Event + 6 years	Current school or fiscal year			yes		Event = completion of project	Operational value

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
		surveys and research reports undertaken to capture information about school system issues; student evaluation and scoring systems and student backgrounds; school and career selection; and external research. Records include applications, surveys and research reports.									
RPL	Research Projects: 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	Event + 6 years	Current school or fiscal year			yes		Event = once the creation of the record occurs	Operational value
RPL	Research Requests	Includes external applications to conduct research from sources such as universities, graduate students and foundations, and their final reports.	Originating department	Event + 1 year	Current school or fiscal year			yes		Event = completion of external research project	Operational value
STU	Bursaries and Awards	Includes records regarding bursaries and awards presented to students at commencement or graduation.	School	Event + 1 year	Current school or fiscal year		yes		yes	Event = retirement/transfer of student	Municipal Freedom of Information and Protection of Privacy Act
STU	Case Files: Attendance Issues	Includes records for students who are referred for counseling on attendance problems. Also includes Supervised Alternative Learning.	School / Student Services	Event + 1 year	Current school or fiscal year		yes		yes	Event = retirement/transfer of student Subject to inclusion in the OSR	Municipal Freedom of Information and Protection of Privacy Act
STU	Case Files: Counseling	Includes case files of students who are referred for behavioural difficulties, psychological testing, speech and language issues, and social worker reports. Records include referrals, reports, and case notes.	School	Event + 10 years	Current school or fiscal year		yes		yes	Case files are maintained in accordance with Health Care Professional guidelines Event = date of last contact or date student turns 18 years of age Copies of summary reports may be included in the OSR for retention in accordance with the	Municipal Freedom of Information and Protection of Privacy Act Education Act Personal Health Information and Protection Act

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
										OSR	
STU	Case Files: Placement Assessments	Records relating to the assessments of students to determine their language background, immigration status, educational history and vocational testing.	School	Event + 1 year	Current school or fiscal year		yes		yes	Event = retirement/ transfer of student	Municipal Freedom of Information and Protection of Privacy Act
STU	Case Files: Referrals	Includes a compilation of all records for individual students who are referred for student services. Includes final summaries, confidential reports, and consents to disclosure and referral forms. May include home instruction/home schooling records.	Student Services	Event + 10 years	Current school or fiscal year		yes		yes	Event = resolution of issue Subject to inclusion in the Event = date of last contact or date student turns 18 years of age Subject to inclusion in the OSR	Municipal Freedom of Information and Protection of Privacy Act
STU	Case Files: Student Welfare	Includes correspondence and confidential reports regarding students where there is suspicion of child abuse, neglect or family violence. A notation that a report has been forwarded to the Children's Aid Society is adequate for the OSR	School	Event + 2 years	Current school or fiscal year		yes			Event = date of report This documentation is not considered part of the Ontario Student Record and should be kept in a file in the principal's office for security. A notation that a report has been forwarded to the Children's Aid Society is adequate for the OSR	Municipal Freedom of Information and Protection of Privacy Act
STU	Examinations and Testing	Includes records regarding student exams and/or province-wide testing, such as EQAO. Records include correspondence, exam day schedules, exam day attendance and originals of completed student examinations. Excludes master copies of blank exams.	School	Current + 1 year	Current school or fiscal year		yes			Current = retain for the current school year	Municipal Freedom of Information and Protection of Privacy Act

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
STU	Extracurricular Activities	Includes records regarding school extracurricular activities such as clubs, choir, student council and athletics.	School	Current + 1 year	Current school or fiscal year					Current = retain for the current school year	Operational value
STU	Guidance Materials	Includes brochures, calendars, description sheets and catalogues relating to career opportunities, external school programs, post-secondary education, private schools, and scholarships to support students.	School	Superseded	Current school or fiscal year					Superseded = retain until a new version replaces the old one	Operational value
STU	Office Index Cards	Includes all office index cards containing personal information, as well as retirement or transfer information on individual students, which is available for immediate access and as OSR backup information. The OIC may be retained electronically if a hard copy can be readily produced.	School	Event + 55 years			yes			E = retirement or transfer of student Note: New OIC replaces previous year's OIC. Ensure that OICs for all students who have left have been removed before shredding previous year. Retain one (most recent) OIC upon student transfer/retirement. OIC must reflect most recent information on file at that time, date of retirement/transfer and OSR transfer information if applicable	Municipal Freedom of Information and Protection of Privacy Act Education Act
STU	Ontario Student Records	Includes original Ontario Student Record folders with all documentation maintained for the OSR system, such as final student report cards and Ontario Student Transcripts, records of instruction in French/Native as a second language, documentation file, Special Education programs and SAL. May include reports from third parties in accordance with the Ministry of Education's	School	Event + 55 years						Event = retirement or transfer of student, computer database record purged on retirement/transfer Note: Includes electronic data Note: 5 years post-retirement, shred all	Municipal Freedom of Information and Protection of Privacy Act Education Act

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
		Guideline.								<p>records but the office index card, the transcript and the OSR folder in accordance with the OSR guideline</p> <p>Retention for Violent Incidents Report = Event = + 3 or Event + 5 (as below)</p> <p>No suspension/ expulsion = event + 3 years (Event = three years without report of a violent incident to police)</p> <p>Suspension = event + 5 years (Event = completion of five consecutive years during which there were no further suspensions for serious violent behaviour)</p>	
STU	Programs: Cooperative Education	Includes correspondence with potential employers, surveys, and monthly monitoring teacher reports, statistics and other records of co-operative education programs. Also includes apprenticeship programs.	School	Event + 6 years	Current school or fiscal year					Event = termination of work placement	Municipal Freedom of Information and Protection of Privacy Act
STU	Programs: Non-Classroom	Includes records regarding student exchanges and field trips and arrangements for special events related to specific programs, such as concerts, festivals, track meets, facility tours, tournaments, art or essay	School	Current + 1 year	Current school or fiscal year			yes		Current = retain for the current school or fiscal year	Municipal Freedom of Information and Protection of Privacy Act

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
		contests and science fairs. Records include correspondence, plans, schedules, etc.									
STU	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	Current + 2 years Permanent retention for registers prior to 1970			yes			Current = retain for the current school year Permanent retention for registers prior to 1970	Municipal Freedom of Information and Protection of Privacy Act Education Act
STU	Registers: Student Marks	Includes information on students' courses completed, marks received and mark verification sheets. Excludes report cards.	School	Current + 1 year			yes			Current = retain for the current school year Student marks are included in the OSR as part of report card	Municipal Freedom of Information and Protection of Privacy Act
STU	Student Exchanges	Includes information on plans for exchanges, exchange reports and exchange schedules.	School	Event + 1 years	Current school or fiscal year		yes		yes	Event = retention begins once exchange is completed	Municipal Freedom of Information and Protection of Privacy Act
STU	Student Health Records	Includes medical and health information regarding students required for the care and treatment of students in the school setting. Includes pediculosis, medical emergency plans, administration of medication plans and other health related materials.	School	Current + 1 year			yes		yes	Subject to inclusion in the OSR	Municipal Freedom of Information and Protection of Privacy Act Personal Health Information and Protection Act
STU	Student Meal Programs	Includes records of school milk and breakfast programs, such as lists of students involved in the programs.	School	Current + 1 year			yes			Current = retain for the current school year	Municipal Freedom of Information and Protection of Privacy Act
STU	Student Records: Continuing Education	Includes mature student appraisals, marks and other student-centered records for continuing education courses.	School	Event + 1 year	Current School Year		yes		yes	Event = retirement or transfer of student	Municipal Freedom of Information and Protection of Privacy Act
STU	Student Records: Co-op Programs	Includes records of individual students participating in co-operative education work assignments, such as copies of	School	Event + 1 year	Current school or fiscal year		yes		yes	Event = retirement or transfer of student Subject to inclusion	Municipal Freedom of Information and Protection of Privacy Act

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
		work education agreements, evaluation forms for employer interviews, training plans and applications for programs, and student evaluation forms.								in the OSR	Education Act
STU	Student Records: External Program Participation	Includes requests, consent/permission forms, correspondence and reports regarding school field trips and reports relating to students involved in student exchanges.	School	Event + 1 year	Current school or fiscal year		yes	yes	yes	Event = completion of exchange or program Subject to inclusion in the OSR	Municipal Freedom of Information and Protection of Privacy Act Education Act
STU	Student Records: International Students	Includes records on international student files, medical information and home stay contacts.	School/ISP	Event + 1 year	Current school or fiscal year		yes		yes	Event = completion of program Subject to inclusion in the OSR	Municipal Freedom of Information and Protection of Privacy Act Education Act
STU	Student Records: Special Needs	Includes records for students requiring special equipment to assist in the instruction of the student. Includes records of individual students who are referred for placement in special program classes, such as applications for admission, tests, assessments and raw data (e.g., IEP). Excludes Financial records FIN-Grants/Funding.	School/Student Services	Event + 1 year	Current school or fiscal year		yes		y	Event = retirement or transfer of student Subject to inclusion in the OSR Note: retain SEA Claim/equipment PO for 7 years	Municipal Freedom of Information and Protection of Privacy Act Ministry of Education
STU	Student Registrations Applications	Includes blank registration forms and applications for school entry, or special programs, such as French Immersion, summer school or continuing education. Also includes copies of applications to universities and colleges, etc.	School	Superseded	Current school or fiscal year					Superseded = retain until a new version replaces the old one	Municipal Freedom of Information and Protection of Privacy Act
STU	Student Reporting	Includes all reports concerning individual students that are retrievable by student name or other identifier, such as first language reports, non-resident student reports, class list reports, Ontario Scholar lists, student	School	Event + 1 year	Current school or fiscal year		yes				Municipal Freedom of Information and Protection of Privacy Act

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
		online transaction listings and Student Information System edits.									
STU	Suspensions Expulsions	Includes records of students who are suspended/expelled from school and all school-related activities in accordance with the Education Act. Includes investigative notes, reports and appeal records.	School	Suspension Documents Event + 3 years Expulsion Documents Event + 5 years	Current school or fiscal year		yes		yes	Event = incident of suspension, where no further suspensions have occurred Final suspension letters may be filed in the OSR in accordance with board policy Records may be removed or retained by principal if deemed appropriate. Suspension for violent incidents to be retained as follows: Event + 3 years or Event + 5 years (as below) No suspension/expulsion = Event + 3 years (Event = three years without report of a violent incident to police)	Municipal Freedom of Information and Protection of Privacy Act Education Act
STU	Timetables Schedules	Includes elementary course timetables, secondary school course calendars, yard duty schedules, school year calendars, school bell schedules, and related records.		Superseded	Current school or fiscal year			yes		Superseded = retain until a new version replaces the old one	Operational value
STU	Transfers Exits Admittances Retirements	Includes reports and forms recording the transfer, exit, room changes, promotions or admittance of students from schools. Includes signed and dated forms authorizing student admissions, transfers or retirements. Also includes	School	Event + 1 year	Current school or fiscal year		yes		yes	Subject to inclusion in the OSR	Municipal Freedom of Information and Protection of Privacy Act Education Act

Records Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-responsible Department (copies, short term operation use)	Vital Record	Personal Information	Archival Record Review	Included in OSR	Notes	Value of Record
		registration forms and applications for school entry or special programs such as French Immersion, summer school or continuing education. Also includes copies of applications to universities and colleges, etc.									
STU	Transportation: Student Bus Services	Includes records concerning transportation/busing for transportation of students to and from schools, Special Education, field trips, and special programs. Records include bus schedules, requests for transportation, bus routes, boundaries and student lists (names and addresses).	School	Current + 1 year	Current school or fiscal year		yes				Municipal Freedom of Information and Protection of Privacy Act Education Act