XXXX: RECORDS RETENTION (AP)

Approved 09 04 24

BACKGROUND

The Board of Education of School District 70 Pacific Rim requires records to be maintained and provide control over the quality and quantity of information produced by the School District from its creation until its disposal for legal, fiscal, and historical purposes and that proper custody, storage and disposal of records shall comply with provincial and federal legislation.

Once records are past their applicable timeframe as outlined in the Records Retention AP the Office of the Primary Responsible (OPR) for the departments records is authorized to destroy them if they are satisfied that the records hold no further value and no historical or archival value remains.

The Secretary Treasurer is responsible for the implementation and maintenance of the Records Retention AP.

The Board supports transition of records from paper-based to electronic where it is possible to ensure security of such records in a form consistent with Ministry regulations.

DEFINITION

Record; defined as all recorded information in the custody or control of School District 70 regardless of physical format, which is collected, created, deposited, or held by or in School District 70.

Various codes are included for each record series as defined below:

W = week	record series is to be retained for the week, or number of weeks from creation or receipt
M = month	record series is to be retained for the month, or number of months from creation or receipt
Y = year	record series is to be retained for the year, or number of years from creation or receipt
A = active phase	period for which the record is needed to conduct daily work
CY = current year	this may be defined as any 12-month period including calendar, school, or fiscal year
SA = semi-active phase	period for which records must be retained for regulatory reasons, but not needed for daily work and can be stored, sometimes referred to as inactive period
FD = final disposition	period when records may be destroyed, or transferred to permanent storage
D = destroy	discard by appropriate means
SR = selective retention	retain key policy documents and other significant records
FR = full retention	retain all records in series
SO = until superseded	retain records until they are replaced or updated or obsolete

P = permanent retention   retain all records in series permanently

ACR = archives   transfer records to archives

NA = not applicable   instructions do not apply to this record series

ORGANIZATION

The records are classified into sections following the numerical guide below.

1. Administration
2. Communications, Relations, and Privacy
3. Facilities and Transportation
4. Financial Management
5. Human Resources
6. Information Technology Systems and Services
7. Payroll
8. Student Programs and Records
9. Health and Safety

PROCESS

Periodically, all records will be digitized by District Staff. Once the records are digitized and no longer active, they will be moved to storage. At the end of their useful life, active and semi-active phases, any records with a final disposition of destroy will be shredded. Records with a final disposition of permanent will be retained in both digital and physical forms. Any records with a final disposition of specific retention, will be reviewed periodically and the Office of the Primary Responsible will determine if the physical records need to be retained further or can be destroyed.

Any records that are to be destroyed must be recorded on the District Record Destruction Log and approved by the Office of the Primary Responsible.

Digital files will be kept on a secure external storage.

SECTION 1
ADMINISTRATION

Primary Numbers 0100 – 0999

OFFICE OF THE PRIMARY RESPONSIBLE: Secretary Treasurer, Delegate: Manager of Corporate Services

0100 Administration – General
0150 Agendas of Regular, In-Camera and Special Board Meetings
0200 Board Policies and Procedures
0400 Board of Education
0500 Committees
0600 Management Reviews & Services

		A	SA	FD
0100	**ADMINISTRATION - GENERAL**			
	Includes records relating generally to administrative functions which are not found elsewhere in this section.			
-00	General	CY + 1	2y	D
0150	**AGENDAS OF REGULAR, IN-CAMERA AND SPECIAL BOARD MEETINGS**			
	Includes all records of a general nature relating to the Board of Education meetings, including committee meetings (e.g. Education, Finance and Operations, Policy, Special Meetings, etc.)			
-00	Agendas	CY + 1	4y	P
-01	Minutes	CY + 1	4y	P
-02	Notice of Meetings	CY + 1		D
-03	Reports	CY + 1	4y	P
-04	Resolutions	CY + 1	4y	P
0200	**BOARD POLICIES AND PROCEDURES**			
	Includes electronic and paper records relating to Board Policies and Procedures for the School District			
-00	General	SO		D
-01	Approved Policies and Procedures	SO		D
-02	Draft Policy and Procedure Development, by number	SO + 2		D
0400	**BOARD OF EDUCATION - GENERAL**			
	Includes records of a general nature relating to the School District governing body, the Board of Education which does not appear in other related subject areas.			
-00	General	CY + 1	4y	P
-10	Trustee Elections	SO*		D
-20	Trustee Oaths and Declarations	SO*		D

*SO = at completion of term of office

		A	SA	FD
0500	**COMMITTEES**			
	Includes records relating to School District 70, Pacific Rim committees, subcommittees and task forces including agenda, minutes, and terms of references not related to Board of Education Committees (e.g. Health and Safety Committee, etc.)			
	For Board of Education Committees see primary 0400.			
-00	General	CY + 1	6y	SR
-10	Committees, alpha by name	CY + 1	6y	SR

		A	SA	FD
0600	MANAGEMENT REVIEWS & SERVICES			

Includes records relating to management improvement studies, office surveys and other records relating to management information systems and operation performance surveys, etc.

		A	SA	FD
-00	General	CY + 1	2y	D

SECTION 2
COMMUNICATIONS, RELATIONS AND PRIVACY

Primary Numbers 1000 – 1999

Office of the Primary Responsible: Secretary Treasurer, Delegate: Manager of Corporate Services

1000 Public Relations – General
1100 General Correspondence
1200 Freedom of Information Requests
1500 Public Interest Disclosures
1600 Records Management - General
1800 Strategic Planning

		A	**SA**	**FD**

1000 PUBLIC RELATIONS – GENERAL

Includes records relating to the general administration of public relations and media government relations including records of press releases, radio and television broadcasting, etc.

-00	General	CY + 1	2y	D

1100 GENERAL CORRESPONDENCE

Includes electronic and paper records correspondence relating to information requested and provided, except Freedom of Information requests

For Freedom of Information requests see primary 1200

-00	General	CY + 1		D

1200 FREEDOM OF INFORMATION REQUESTS

Includes electronic and paper records relating to freedom of information and protection of privacy issues. Includes information regarding requests for access to information, personal information banks (PIB), public use records, reports, recommendations and orders from the Information and Privacy Commissioner.

-00	General	CY + 6		D
-01	Directory of Records	CY + 6		D
-02	Log Book of requests for access, by year	CY + 75		D

1500 PUBLIC INTEREST DISCLOSURES

Includes records relating to regulation, disclosures, and public interest disclosure issues.

-00	General	CY + 6		D
-01	Disclosures	CY + 6		D
-10	Log book of requests for access	CY + 75		D

1600 RECORDS MANAGEMENT

Includes records relating to records management operational standards and procedures, the coordinated classification of records, the organization, operations and content of files. Also including records relating to the development and application of approved records retention schedules for systematic disposition of District Records.

-00	General	SO + 6		D
-01	Classification System/Retention Schedule	SO + 6		D

		A	**SA**	**FD**

1620   RECORDS MANAGEMENT – RECORDS STORAGE

Includes records relating to the transfer, storage and retrieval of records, the final disposition of when records are approved for destruction, historical information for archival material, designation of materials for archival and related records.

		A	SA	FD
-00	General	SO + 6		D
-01	Records Centre Storage Log Books	SO + 6		P
-02	Storage Lists	SO + 6		D
-03	Archives	SO + 6		D

1800   STRATEGIC PLANNING

Includes records relating to Strategic Planning for the District which includes development, planning process, Implementation of mission statements, philosophies, visions, values, annual District directions and other plans.

		A	SA	FD
-00	General	SO + 6		D
-01	Reports, by name	SO + 6		P

SECTION 3
FACILITIES AND TRANSPORTATION RECORDS

Prime Numbers 2000 – 3999

Office of the Primary Responsible: Secretary Treasurer, Delegate: Director of Operations

2000 Appraisal and Inventory Records

2200 Building plans and specifications related to change, guarantees, bonds, liens, and valuable correspondence

2300 Insurance Claims

2340 Insurance Policies

2400 Land titles, deeds and plans

2500 Mortgages and Leases

2800 Rental Facility Contracts

3200 School Bus Behaviour Reports

3300 School Bus Video Tapes

3800 Vehicle Maintenance Records

*student bus registration forms see student records

			A	SA	FD
2000	APPRAISAL AND INVENTORY RECORDS				

Includes records relating to appraisal of inventory, replacement, warehouse storage, inventorying, and stocktaking.

			A	SA	FD
-00	General		CY + 2		D
-01	Appraisals		SO + 2		D
-10	Inventories, by subject		CY + 2		D
-15	Suppliers		SO		D
-20	Warehouse Storage		CY + 2		D

2200	BUILDING PLANS AND SPECIFICATIONS RELATED TO CHANGE, GURANTEES, BONDS, LIENS AND VALUABLE CORRESPONDENCE

Includes records relating to accommodation and current and future planning requirements, building directories, addresses and locations, alterations and repairs, inspections, damages, maintenance and parking.

		A	SA	FD
-00	General	CY + 1	4y	SR
-01	Building directories and floor plans	SO		P
		(SO = until modified)		
-02	Repair project files	SO	6y	SR
		(SO = completion and expiry of warranties)		
-20	Construction Project Files	SO	4y	SR
		(SO = completion of project)		
-30	Damage Incidents	CY + 1	4y	D
-40	Maintenance, General	CY + 1	4y	SR

2300	INSURANCE

Includes records relating to damage claims and theft of facilities, equipment and vehicles.

		A	SA	FD
-00	General	CY + 1	2Y	SR
-01	Certificates of Insurance	CY + 6		D
-20	Claims Case Files	SO + 1	5y	D

2340	INSURANCE POLICIES

Includes records relating to insurance polices for facilities, equipment and vehicles.

		A	SA	FD
-00	General	CY + 1	2y	SR
-01	Renewals	CY + 6		D
-02	Policies	SO	SO + 25	D

	A	SA	FD

2400 LAND TITLES, DEEDS AND PLANS

Includes records relating to land titles, deeds, plans and acquisition or disposal not listed in other areas of this document.

		A	SA	FD
-00	General	CY + 1	4y	SR
-01	Specific Acquisitions	SO		P
	(SO = until disposal of property)			
-02	Agreements, by address	SO	6y	P

2500 MORTGAGES AND LEASES

Including records relating to the financing or capital assets not listed in other areas of this document.

		A	SA	FD
-00	General	SO	6y	D
-01	Mortgage Documents	SO	6y	D
	(SO = until disposal of property)			

2800 RENTAL FACILITY CONTRACTS

Including records relating to rental of School District Facilties by outside groups including sports groups, community groups, childcare groups, etc.

		A	SA	FD
-00	General	SO	6y	D
-01	Rental agreements, by site	SO	6y	D

3200 SCHOOL BUS BEHAVIOUR REPORTS

Including records relating to unsafe and inappropriate behaviour while traveling on School District operated transportation.

		A	SA	FD
-00	General	CY + 1		D

3300 SCHOOL BUS VIDEO TAPES

		A	SA	FD
-00	General	CY + 1		D

3800 VEHICLE MAINTENANCE RECORDS

Including records relating to vehicles used for student transportation, employee transportation, maintenance, and yard equipment.

		A	SA	FD
-00	General	SO	1y	D
-01	Motor Vehicle Inspection	SO	1y	D
-02	Air Care Inspection	SO	1y	D
-10	Vehicle History	SO	1y	D

SO = until disposal of vehicle/equipment

SECTION 4
FINANCIAL MANAGEMENT

Primary Numbers 4000 – 5999

Office of the Primary Responsible: Secretary Treasurer

4000 Annual Budget and summary supporting documents
4050 Auditor's reports
4070 Bank statements, debit and credit notes
4100 Accounts Payable
4200 Employee travel claims
4300 General Ledger
4400 Accounts Receivable
4500 Loans, Authorization
4520 Loans, cancelled notes
4600 Ministry of Education and Childcare financial information reports
4800 Transportation Assistance forms
5200 Purchasing Contracts
5300 Purchase Orders and Requisitions

		A	SA	FD
4000	**ANNUAL BUDGET AND SUMMARY SUPPORTING DOCUMENTS**			

Includes record relating to budgets in all natures including general, capital, operating, and grant funds. This includes preparation of budgets not mentioned in other area's of this document.

-00	General	SO	2y	P
-01	Budget Projections and Plans	SO	2y	P
-10	Capital Budgets, by school year	CY + 1		P
-20	Operating Budgets, by school year	CY + 1		P
-30	Grant Budgets, by school year, by project	SO	6y	P
		(SO = Grant funds are fully utilized)		

4050	**AUDITORS REPORTS**			

Including records relating to the administration of audits, reviews of agreements, procedures and programs, correspondence, reports, responses and follow-ups.

-00	General	CY +1	2y	SR
-01	Audits, by year	SO	6y	P
		(SO = when audit is completed)		

4070	**BANK STATEMENTS, DEBIT AND CREDIT NOTES**			

Including records related to bank statements, bank deposits, credit notes and reconciliations. Individual site bank accounts, district bank accounts, and fundraising accounts.

-00	General	CY	6y	D
-01	Accounting Records	CY	6y	D
-02	Bank Statements, reconciliations	CY	6y	D
-10	Original Financial Transaction Documents	CY	6y	D
-20	Bank Account Establishment and Termination	SO	6y	D
		(SO = bank account closed)		

4100	**ACCOUNTS PAYABLE**			

Including records relating to canceling School District issued cheques and electronic payments, supporting documents, cheque duplications, requisitions, issuing of cheques, stop payments of electronic payments.

-00	General	CY	6y	D
-01	Accounts Payable payments	CY	6y	D
-02	Cheque and Epayment Registers	SO		P
-10	Cheque and Epayments Duplications	CY	6y	D
-11	Cancelled Cheques	CY	6y	D
-12	Stopped Payments	CY	6y	D
-20	Cheque Requisitions	CY	6y	D

			A	SA	FD
4200	**EMPLOYEE TRAVEL CLAIM FORMS**				
	Including records relating to travel reimbursements for mileage and per diem meals, both in-district and out-of-district requests.				
	-00	General	CY	6y	D
	-01	In-District Travel Claims	CY	6y	D
	-02	Out-Of-District Travel Claims	CY	6y	D
4300	**GENERAL LEDGERS**				
	Including general ledgers, account creation/change/deletion, accounting procedures for general ledgers and trial balances, both at the District and School levels.				
	-00	General	CY	6y	D
	-01	General Ledger Account Creations/Changes/Deletions	CY	6y	D
	-02	General Ledger Trial Balances	CY		P
	-10	Subsidiary Ledgers and Journals	CY	6y	D
4400	**ACCOUNTS RECEIVABLE**				
	Including records relating to receivable accounts from revenue generating services and the collection.				
	-00	General	CY	6y	D
	-10	Accounts Receivable Listings	CY	6y	D
	-11	Outstanding Accounts	CY	6y	D
	-20	Invoices Issued	CY	6y	D
	-30	Receipts	CY	6y	D
4500	**DEBT AND LOANS**				
	Including records relating to debt financing, loans, loan authorizations, etc.				
	-00	General	CY + 1	2y	SR
	-01	Debt and Loan Agreements	SO	6y	D
	-02	Loan Authorizations	SO	6y	D
		(SO = once debt paid in full)			
4600	**MINISTRY OF EDUCATION AND CHILDCARE FINANCIAL INFORMATION REPORTS**				
	Including records related Ministry of Education and Childcare Financial reports for Financial Statements, Budget, GRE, Nominal Roll, Event-Driven, LEA, SOFi, etc.				
	-00	General	CY	6y	D
	-01	Financial Statements	CY		P
	-02	Preliminary Reports	CY		P
	-03	Amended Reports	CY		P
	-04	Finalized Reports	CY		P

			A	**SA**	**FD**
4800	TRANSPORTATION ASSISTANCE FORMS				
	-00	General	SO	2y	D
	-01	Travel Assistance Request Forms	SO	2y	D

(so = the student reached age 19)

5200	PURCHASE CONTRACTS				

Including records relating to contracts with suppliers, supplier information, subscription's, quotes.

	-00	General	CY	6y	D
	-01	Supplier Information	SO	6y	D

(SO = Supplier no longer operating)

	-10	Purchase Contracts	CY	6y	D
	-11	Purchase Subscriptions	SO	6y	D

(SO = subscription expired)

	-20	Quotes	SO	6y	D

(SO = quote has been fulfilled by purchase or expired)

5300	PURCHASE ORDERS AND REQUISITIONS				

Including records relating to requests for purchases, approvals or denials of purchase orders.

	-00	General	CY	6y	D
	-01	Purchase Order Requests	CY	2y	D
	-02	Purchase Orders Approved	CY	6y	D

SECTION 5
HUMAN RESOURCES

Primary Numbers 6000 – 6999

Office of the Primary Responsible: Human Resources

6000 Applications and Postings
6050 Benefit Information Package Records
6100 Collective Agreements with Unions
6200 Contracts with Individual Employees
6300 Employee Files
6350 Employee Supervision and Development
6400 Job Description and Classification
6500 Legal Matters
6550 Letters of Discipline
6600 Leave Records
6700 SDS Records
6800 Seniority Lists

		A	**SA**	**FD**
6000	**APPLICATIONS AND POSTINGS**			

Including records relating to employment application package, resumes, unsolicited resumes, short-listed candidates, interview materials, results, rejection letters, etc.

		A	**SA**	**FD**
-00	General	CY	1y	D
-01	Employment Application Packages	CY	1y	D
-02	Employment Postings	CY	1y	D
-03	Interview Materials	CY	1y	D
-04	Candidate Lists	CY	1y	D
-05	Unsolicited Resumes	CY		D

6050   BENEFIT INFORMATION PACKAGE RECORDS

Including records relating to benefit packages to employees.

For records relating to specific payroll benefits, see section 7700.

		A	SA	FD
-00	General	CY	6y	D
-10	Services, by name	CY	6y	D

6100   COLLECTIVE AGREEMENTS

Including records relating to relationships between management, ADTU, CUPE, PVPA, and BCPSEA, Collective Agreements, negotiations, grievances, discipline, union dues, etc.

		A	SA	FD
-00	General	CY	6y	D
-01	Collective Agreements	SO	6y	D
		(SO = new CA has been adopted)		
-02	Negotiations	CY	6y	D
-03	Grievances/Arbitrations	CY +		P

6200   CONTRACTS WITH INDIVIDUALS

Including records relating to individual employment contracts with excluded staff, contracted employees, administrators, etc.

		A	SA	FD
-00	General	SO	2y	D
-01	Individual Contracts, by name	SO	7y	P
		(SO = employee terminated)		

			A	SA	FD
6300	**EMPLOYEE FILES**				

Including records relating to employees resumes, qualifications, criminal record checks, certifications, references, bank forms, waivers, individual employment contracts, termination, etc.

			A	SA	FD
-00	General		SO	7y	P
-01	Resumes		SO	7y	P
-02	Qualifications/Transcripts		SO	7y	P
-03	Criminal Record Checks		SO	7y	P
-04	References		SO	7y	P
-10	Certifications		SO	7y	P
			(SO = certification expired)		

SO = until employee terminated, unless otherwise specified.

6350   EMPLOYEE SUPERVISION AND DEVELOPMENT

Including records relating to professional and staff development, staff meetings, department head reports, etc.

			A	SA	FD
-00	General		SO	3y	D
-01	Internal Training, by name, year		SO	3y	D
-02	External Training, by name, year		SO	3y	D
-03	Professional Development Planning, by name		SO	1y	D

6400   JOB DESCRIPTIONS AND CLASSIFICATION

Including records relating to job descriptions, classification, evaluations, responsibilities, appeals and reviews of classifications.

			A	SA	FD
-00	General		CY	3y	D
-01	Job Descriptions		SO	1y	SR
			(SO = description updated / position discontinued)		
-02	Appeals and Reclassifications, by position		CY	3y	D

6500   LEGAL MATTERS

Including records relating to matters of general legal concern to the School District, legal memoranda prepared or received by District Staff on a variety of issues, and litigation.

			A	SA	FD
-00	General		CY + 1	2y	D
-01	Index of Legal Opinions		SO		P
-02	Opinions / Memos, by subject		SO		P
-10	Index of Litigation		SO		P
-15	Cases, by date and name		SO		P

		A	SA	FD
6550	**LETTERS OF DISCIPLINE**			

Includes records relating to administration of discipline action and documentation files resulting from such action. Individual records of employee discipline are copied to employee files.

		A	SA	FD
-00	General	CY + 1	2y	P
-10	Discipline Case Files	SO	6y	P
-20	Precedent Files	SO	6y	P

6600	**LEAVE RECORDS**			

Including records relating to various types of leaves management including vacation, sick, paid holidays, unpaid leaves, etc. Individual employee letters are filed with employees records.

		A	SA	FD
-00	General	CY + 1	6y	D
-10	Leave Lists	CY + 1	6y	D

6700	**SDS RECORDS**			

Including records relating to SDS tracking of positions, evaluations, certifications/qualifications, and other staffing reports.

		A	SA	FD
-00	General	SO	6y	D
-01	Staffing level reports	CY + 1	1y	SR
-10	TTOC Dispatch	CY + 1	1y	D
-20	Support Staff Substitutes	CY + 1	11	D

6800	**SENIORITY LISTS**			

Including records relating to awarding seniority, seniority date lottery, and seniority tracking.

		A	SA	FD
-00	General	SO	2y	D
-01	Seniority Lists	SO	2y	D

SECTION 6
INFORMATION TECHNOLOGY MANAGEMENT

Primary Numbers 7000 – 7499

Office of the Primary Responsible: Manager of Information Technology

7100 Information Technology Database backups, incident reports, maintenance of records
7200 Information Technology Service Request Authorizations
7300 Information Technology System Development and Changes
7400 User ID's

*Student IT System Data see student records

		A	SA	FD
7100	**INFORMATION TECHNOLOGY DATABASE BACKUPS, INCIDENT REPORTS, MAINTENANCE RECORDS**			

Including records relating to electronic data systems, administration of computer system hardware, applications, design information (including research, system requirements, specifications), and implementation of strategies, and technical working notes, and progress reports.

		A	SA	FD
-00	General	SO	2y	D
-01	Standard	SO	2y	D
-02	Reports, by name	SO	2y	D
-03	Projects, by site, by name	SO	6y	D
-10	Backup Log Books	SO	2y	D

7200	**INFORMATION TECHNOLOGY SERVICE REQUEST AUTHORIZATIONS**			

Including records relating to service users requests for computer hardware and software, may also include measurements of systems use for evaluations, reports, billing, etc.

		A	SA	FD
-00	General	SO	2y	D
-01	Log of Service Requests	SO	2y	D
-02	Reports, by name	SO	2y	D
-10	Log of Hardware Lent	SO	2y	D

7300	**INFORMATION TECHNOLOGY SYSTEM DEVELOPMENT**			

Including records relating to the development of information systems, changes to information systems, and implementation of changes.

		A	SA	FD
-00	General	SO	6y	D
-01	System Upgrades and Projects	SO	2y	D

7400	**USER ID'S**			

Including records relating to employee and student users of School District electronic systems.

		A	SA	FD
-00	General	SO	2y	D
-01	Employee User's	SO	2y	D
	(SO = until employee terminated)			
-02	Student Users	SO	2y	D
	(SO = until student turns 19 years of age)			

SECTION 7
PAYROLL RECORDS

Primary Numbers 7500 - 7999

Office of the Primary Responsible: Secretary Treasurer

7500 Employee Payroll Records
7550 Employee Attendance Records
7700 Payroll Benefits
7800 Payroll Deductions
7900 Payroll Salaries and Wages

*SO = until employee terminated

			A	SA	FD
7500	**EMPLOYEE PAYROLL RECORDS**				
	Including records relating to individual employees such as personal data, resumes, evaluations, training, discipline, health examinations, general information on leaves or termination, bank information, waives, individual employment contracts, etc.				
	-00	General	SO	7y	D
	-10	Employee Files, alpha by name	SO	7y	D
	-20	Teacher History Cards	SO		P
	-40	Staff Lists/Location, by employee group	SO	1y	D
	-50	Records of Employment	SO	7y	D
7550	**EMPLOYEE ATTENDANCE RECORDS**				
	Including records related to employees attendance: time and attendance reports, various types of leaves, etc.				
	-00	General	SO	7y	D
	-01	Employee attendance records, by group, by period	SO	7y	D
7700	**PAYROLL BENEFITS**				
	Includes records relating to the enrolment, change and termination of individual employees benefits, including BC Pensions (MPP, TPP), dental plans, extended health, life insurance, employment insurance, Canada pension, short-term disability, long-term disability, rpp savings, deferred salary plans, retiring allowances, EFAP, etc.				
	-00	General	SO	7y	D
	-01	Pensions – BC Public Services	SO		P
	-02	Dental Plans	SO	7y	D
	-03	Extended Health	SO	7y	D
	-04	Life Insurance	SO	7Y	D
	-05	Employment Insurance	SO	7Y	D
	-06	Canada Pension	SO	7Y	D
	-07	Short-term Disability	SO	7Y	D
	-08	Long-term Disability	SO	7Y	D
	-09	Registered Pension Plans (RPP)	SO	7Y	D
	-10	Deferred Salary plans	SO	7Y	D
	-11	Retiring Allowance	SO	7Y	D
	-12	EFAP	SO	7Y	D
7800	**PAYROLL Deductions**				
	Including records related to types of deductions, deduction rates, calculations, etc.				
	-00	General	CY + 1	4y	D
	-01	Statutory Deductions	CY + 1	4y	D
	-02	Compulsory Deductions	CY + 1	4y	D

		A	**SA**	**FD**
7900	Payroll Salaries and Wages			

Including records relating to the payment of employees, including calculation of pay and adjustments. This includes regular, overtime, retroactive and the employee pay records.

		A	**SA**	**FD**
-00	General	CY + 1	4y	D
-01	Current Payroll Files	CY + 1	4y	D

SECTION 8
STUDENT PROGRAMS AND RECORDS

Primary Numbers 8000 – 9999

Office of the Primary Responsible specified in each section

8000 Attendance Reports and Records

8020 Enrolment

8050 Out-of-Catchment

8100 District Generated Assessments

8200 Student Files

8300 Student Support Services and Counselling Records

8400 Principal Files

8500 Scholarships and District Awards

8700 Student Safety

8750 Student Bus Registration Forms

8800 Student Information System Data

9000 Educational Planning and Development

9100 Educational Programs and Services

		A	SA	FD
8000	**ATTENDANCE REPORTS AND RECORDS**			
	Including records relating to student attendance, attendance administration and other data.			
-00	General	CY	1y	D
-01	Attendance Registers	CY		*D

*Transfer individual student information to PR Cards then Destroy

OPR: School Principals

		A	SA	FD
8020	**ENROLMENTS**			
	Including records relating to projections and planning for student enrolment, demographics, school boundary development and monitoring, etc.			
-00	Geneal	CY + 1	2y	D
-01	Enrolment (1701)	CY + 1	2y	D
-02	Projections	CY + 1	2y	D
-10	School Boundaries	CY + 1	2y	D

OPR: Secretary Treasurer

		A	SA	FD
8050	**OUT-OF-CATCHMENT**			
	Including records relating to out-of-catchment applications, approvals, and denials.			
-00	General	CY + 1y	2y	D
-01	Out-of-Catchment Applications	CY + 1y		D

OPR: School Principals

		A	SA	FD
8100	**DISTRICT GENERATED ASSESSMENTS**			
	Includes records relating to the development and administration of District generated testing and results.			
-00	General	SO	3y	D
-10	Examinations, by grade and name	CY	6y	D
-20	Reports, by name	CY	6y	D

OPR: Director of Instruction – Learning and Innovation

		A	SA	FD

8200 STUDENT FILES

Including records relating to official student files, teacher student files, specialty teacher files, youth care files, indigenous support files, etc.

		A	SA	FD
-00	General	CY + 1	2y	D
-01	Student Records	Age 19 + 3y		D/SR
-02	Permanent Record Cards	SO	55y	D
		(SO = until graduation or withdrawal)		
-10	Teacher/Classroom Student files	CY		D
-20	Specialty Teacher Files	CY		SR

OPR: Human Resource Department – Student Records, Permanent Records Cards
          Individual Teachers – Teacher/Classroom Student Files, Specialty Teacher Files.

8300 STUDENT SUPPORT SERVICES AND COUNSELLING RECORDS

Including records relating to official designation files, counselling services, mental health files, special education, hearing, language and speech, District screening files, child and youth care files, kids at risk projects, etc.

		A	SA	FD
-00	General	CY + 1	2y	D
-01	Programs and Services, by name	SO	3y	SR
		(SO = until program replaced)		
-10	Official Designation Files	Age 19	3y	D/SR

OPR: Director of Instruction – Inclusive Education

8400 PRINCIPAL FILES

Including records relating to files Principals for individual students.

		A	SA	FD
-00	General	CY	3y	D

OPR: School Principal

8500 SCHOLARSHIPS AND DISTRICT AWARDS

Including records relating to awards and scholarships available to students in the district, donor information, criteria for selection, and lists of award and scholarship winners.

		A	SA	FD
-00	General	CY + 1	2y	D
-01	Award and Scholarship Winners	SO	6y	SR
		(SO = until student graduates)		
-02	Donor Information, Criteria	CY + 1	2y	D

OPR: Secretary Treasurer - District Level Issued Scholarships
          School Secretary / Counselling Center Secretary - All Other Information

			A	SA	FD

8700 STUDENT SAFETY

Including records relating to the administration and operation of student safety programs and programs aimed at deterring harm and violence in schools.

			A	SA	FD
-00	General		CY + 1	6y	D
-10	Programs, by name		SO	3y	SR

(SO = until program is replaced)

OPR: Director of Instruction – Inclusive Education

8750 STUDENT TRANSPORTATION REGISTRATION FORMS

Including records relating to transportation registration, issuance transportation cards, etc.

			A	SA	FD
-00	General		CY	1y	D
-01	Transportation Registration Forms		CY	1y	D
-02	Transportation Key Cards		SO	1y	D

(SO = until student graduates/leaves district)

OPR: Director of Operations

8800 STUDENT INFORMATION SYSTEM DATA

Including records relating to reports and statistics required for the Ministry of Education and Childcare pertaining to school and student data collection.

			A	SA	FD
-00	General		CY	10y	D
-10	Student Data Reports, by report name		CY	6y	SR

OPR: IT Manager

9000 EDUCATIONAL PLANNING AND DEVELOPMENT

Including records relating to planning and development of functions, development of curriculum, Learning resource materials and programs to support curriculum, etc.

			A	SA	FD
-00	General		CY + 1	2y	D
-01	Programs, alpha by name		SO	3y	SR
-02	Curriculum, locally developed, area, alpha by name		SO	3y	SR

SO = until program replaced

OPR: Director of Instruction – Learning and Innovation

		A	SA	FD
9100	**EDUCATIONAL PROGRAMS AND SERVICES**			

Includes records relating to adult education, alternate programs, co-curricular programs, education by correspondence, continuing education programs, homeschooling, international education, and educational programs and services not mentioned elsewhere in this document.

		A	SA	FD
-00	General	CY + 1	2y	D
-01	Adult Education, by alpha, program name	SO	3y	SR
-02	Alternate Programs, alpha by name	SO	3y	SR
-03	Co-Curricular Programs, alpha by name	SO	3y	SR
-04	Education by Correspondence	CY + 1	6y	D
-05	Continuing Education Programs, alpha by name	SO	3y	D
-06	Home Schooling	SO	3y	SR
-07	International Education	SO	3y	SR

SO = until program replaced

OPR: Director of Instruction - International Education - International Education
Director of Instruction - Learning and Information – All other area's

SECTION 9
HEALTH AND SAFETY

Primary Numbers 10000– 10999

Office of the Primary Responsible: Director of Operations

10000 Accidents and Injuries
10100 Health and Safety
10300 Security
10500 Violent Incident Reports

			A	SA	FD

10000 ACCIDENTS AND INJURIES

Including records relating to employee accidents and personal injuries as a direct result of work duties and to claims with WorkSafe BC.

		A	SA	FD
-00	General	CY + 1	2y	SR
-01	Incident Files	SO	6y	D

(SO = settlements of claims and expiry of limitation period, if injury is based on sexual misconduct, permanent retention)

		A	SA	FD
-10	WorkSafe BC Claim Cost Statements	CY + 1	6y	D
-11	WorkSafe BC Inspection Reports – internal & external	CY + 1	6y	D
-12	WorkSafe BC Re-employment	CY + 1	6y	D
-13	WorkSafe BC Experience Rates	CY + 1	6y	D
-14	WorkSafe BC Audits	CY + 1	6y	D
-15	WorkSafe BC Claims	SO	6y	D

(SO = termination of employment)

10100 Health and Safety

Including records relating to the administration of health and safety programs such as first aid, occupational health, accident prevention, etc. Includes WHMIS.

		A	SA	FD
-00	General	CY + 1	2y	D
-01	Program, by name	CY + 1	2y	SR
-20	Risk Assessments, by site	CY + 1	8y	D

10300 Security

Includes records relating to security of personnel programs, including identification methods, etc. not shown elsewhere in this document.

		A	SA	FD
-00	General	CY + 1	2y	D
-01	Employee Security Passes	SO		

(SO = until employment terminated)

10500 Violent Incident Reports

		A	SA	FD
-00	General	CY + 6		D

References:
XXX: Records Retention Policy SD70
Administrative Records Classification System (gov.bc.ca)
Full Multi - Business Corporations Act (gov.bc.ca), Section 42
Information Management Act (gov.bc.ca)
School Act (gov.bc.ca), Section 95.5 – 95.53