

HSCDSB - RECORDS RETENTION SCHEDULE ADMINISTRATION

Includes records regarding routine administration and office services functions.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
A00	Administration - General Includes administrative records which cannot be classified elsewhere. Use only if no other heading is available. (examples: General Correspondence, Student - Art, Student - Behaviour etc...)	Originator	C + 1	-	2			
A01	Associations / Organizations Includes correspondence, minutes, agenda, notices and reports regarding organizations, associations and federations to which staff belong or with which they communicate in the course of their duties, such as the Ontario Association of School Business Officials, parent organizations, Block Parents, and School and Community Organizations. (examples: Algoma Health Unit, Algoma University etc ...)	Originator	C + 1	-	2			
A02	Audio / Visual Services Includes delivery listings, overdue item listings, requests and bookings and other records concerning the preparation and distribution of slides, overheads, films and other audio/visual materials. Excludes: > Inventories - see A13 Inventory Control	Administration	C + 1	-	2			

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A03	<p>Charities Includes records regarding the raising of funds for charitable organizations. (examples: United Way, Easter Seals and Kidney Foundation etc ...)</p> <p>Excludes: > School Fundraising Events - see A10 Fundraising. > Accounts Payable - see F01. > Accounts Receivable - see F02.</p>	Originator	C + 1	-	2			
A04	<p>Conferences / Seminars - External Includes invitations, approvals, agenda, registrations, notes on the proceedings, and other records regarding external conferences and seminars attended by Board staff.</p> <p>Excludes: > Associations/Organizations - see A01. > Conferences sponsored by Staff Development - see H25 Staff Development.</p>	Originator	C + 1	-	2			
A05	<p>Conferences / Seminars - Internal Includes: Invitations, approvals, agendas, conference papers and proceedings. Also includes any other records relating to conferences, conventions, seminars, trade shows and special functions attended by Board staff or Trustees, or sponsored by the Board.</p> <p>Excludes: Speeches / Presentations - P11. > Conferences sponsored by Staff Development - see H25 Staff Development.</p>	Originator	C + 1		2 *			* Board sponsored are subject to archival review.

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A06	<p>Consultants Includes records relating to the selection, appointment and monitoring of external consultants such as engineers or architects. Includes correspondence, proposals, resumes and company profiles. (examples: A.W. Schreiber Benefits Consultant, Hawn & Associates Inc. etc...)</p> <p>Excludes: > Activities of Curriculum Consultants - file by subject. > Reports of Consultants - file by subject. > Tenders/Quotations - see F29.</p>	Originator	C + 1	-	2			
A07	<p>Equipment Includes records regarding the design and features of office or school equipment and furniture. Specific documentation includes owner's manual, warranty cards, maintenance agreements etc... (examples: copiers, facsimile machines, microfiche readers, air conditioners, tools, gymnasium and playground equipment etc...)</p> <p>Excludes: > Phone bills - see F01 Accounts Payable.</p>	Originator	T	2	T + 2			T = disposal of equipment.
A08	<p>Forms Includes records regarding the creation, revision and management of forms. Also includes sample blank copies of forms, forms masters, copies of printing requests, specifications, and records usage and cost history.</p> <p>Excludes: > All completed forms - file by subject. > Form graphics - see A02 Audio/Visual Services.</p>	Administration	S	-	S			

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A09	<p>Freedom of Information Includes general information and requests for access under MFIPPA legislation, appeals and hearings. Also includes records of use of personal information banks.</p> <p>Excludes: > Destroyed/transferred records - see A19 Records Disposition.</p>	Administration	T + 2	-	T + 2	YES		85, 88, 128, 129 T = final resolution of request or appeal.
A10	<p>Fundraising Includes records of school fundraising events such as hot dog day, bake and craft sales. Records would include information on activities and people involved.</p> <p>Excludes: > Accounts Receivable – see F02. > Fundraising for Charities - see A03 Charities.</p>	School	C + 1	-	2			96
A11	<p>Graphics Standards Includes but is not limited to records regarding the standard which apply to graphic designs in the interest of establishing a visual identity for the Board. (examples: logo and letterhead design, signage, vehicle identification, graphics, business cards, etc...)</p>	Administration	S	P	P	YES	YES	

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A12	<p>Intergovernmental Relations / School Boards Includes general correspondence, information and documentation between the Board and various levels of government such as the municipality, provincial ministries, etc... Whenever possible, reports and records on a specific topic should be classified and filed according to subject. (examples: correspondence and information on other school boards i.e. Algoma District School Board, Nouvel-Ontario, etc...) Excludes: > Curriculum Guidelines - see C01. > Policies/Procedures/Guidelines - see M17. > Education Guidelines - see M08.</p>	Originator	C + 3	-	4			
A13	<p>Inventory Control Includes all records regarding the management of inventories such as stock adjustments, inventory cards, stockroom invoices, confirmation slips for rush orders and packing slips. (example: Audio/Visual inventories, Inventory Cards, Carpenters Tools, etc...) Excludes: > Hazardous Materials Inventories - see B18 Substance Control / Exposure</p>	Originator	C + 1	5	7			74, 97, 99, 120
A14	<p>Library Services Includes records related to Board or school libraries and their operations such as library requests, lists of periodical and book holdings, circulation lists, recommendations for additions to library collections, inter-library loan requests and related documents. (example: Borrowers' Cards, Media Resource Centre, etc...) Excludes: > Textbook lists - see C01 Curriculum Guidelines > Reference materials - see note on Primary Heading Summary Page</p>	Library	S + 1	-	S + 1	YES		85, 88, 128

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			within department	in storage				
A15	Mail Services Includes records regarding dealings with the Board's mailroom, Canada Post, and courier companies. Includes delivery requisitions and other records concerning the transportation of mail, equipment, educational kits, supplies and other items. (examples: general information on mail and courier services, shipping, postage meter, stamps, etc...)	Administration	C + 1	-	2			
A16	Memberships Includes but is not limited to records regarding organizations, associations and subscriptions to which the Board staff belong in the course of their duties where fees are paid. Includes meeting notices, agendas, minutes, annual report etc. (example: Ontario College of Teachers, etc...)	Originator	C + 2		C + 2			
	Excludes: > Conferences/Seminars - External - see A04. > Publications - Non records. > Travel and Accommodation - A23.							
A17	Parking Includes records regarding available parking space at the schools or the Administration Centre, (examples: license plate number lists, parking tickets, etc. ...)	Administration	S + 1	-	S + 1	YES		85, 88, 128

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			within department	in storage				
A18	<p>Printing/Duplicating Services Includes requests and memos regarding the printing of Board documents, publications and forms. Also includes printing logs.</p>	Administration	C + 1	-	2			
A19	<p>Records Disposition Includes documentation regarding the disposition of all records belonging to the Board or school. Includes lists of destroyed and stored records, lists of destroyed or transferred personal information, lists of transferred OSR's, and forms authorizing the destruction of records. Also includes retention schedules.</p> <p>Excludes: > Records Management - see A20.</p>	Administration	P	-	P	YES	YES	26, 85, 87, 88, 128
A20	<p>Records Management Includes information regarding the management of records, regardless of medium. Specific records include file lists, records management programs and related correspondence. (examples: Index of Files, Table of Content)</p> <p>Excludes: > Records Disposition - see A19. > Retention Schedules - see A19 - Records Disposition. > Policies/Procedures/Guidelines - see M17.</p>	Administration	S + 1	-	S + 1			26

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			within department	in storage				
A21	<p>Staff Meetings / Committees Includes records regarding staff meetings and committees for both Board and school staff for which there is no specific subject heading available. (examples: Principals Meetings, Head Secretaries Meetings, Special Advisory Committees, etc...)</p> <p>Excludes: > Board Minutes/Agenda - see M03/M04. > Trustee Committees - see M20. > Associations/Organizations - see A01.</p>	Originator	C + 1	-	2		YES	
A22	<p>School Councils Includes records regarding school council meetings and the school plan for co-instructional activities.</p>	School	C + 3	-	4			34
A23	<p>Translation / Interpretation Services Includes correspondence, memos, requests for services, completed jobs and all other records relating to the translation/interpretation services in various languages that are available to facilitate communication among teachers, students and parents.</p>	Administration	C + 1	-	2			

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			within department	in storage				
A24	<p>Travel and Accommodations Includes but is not limited to records regarding travel and accommodation arrangements. (examples: itineraries, maps, schedules, hotels, ticket information, etc...)</p> <p>Excludes: > Conferences/Seminars - External - see A04. > Employee and Trustee Expenses - see F14.</p>	Originator	C + 1		2			
A25	<p>Vendors / Suppliers / Caterers Includes records regarding vendors and suppliers of goods and services as well as information about these goods and services such as catalogues, price lists and correspondence. (example: Businesses into Schools, etc...)</p> <p>Excludes > Purchase Orders - see F22. > Tenders/Quotations - see F29.</p>	Originator	C + 1	-	2			

HSCDSB - RETENTION SCHEDULE

BUILDING MAINTENANCE / OPERATIONS / DEVELOPMENT

Includes records regarding the development, maintenance, construction and operation of Board offices, properties, grounds, and buildings. Also includes vehicle and occupational health and safety matters.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
B00	<p>Building Maintenance / Operations / Development - General Includes building maintenance/operations/development records which cannot be classified elsewhere. Use only if no other heading is available. (examples: Correspondence to Carestaff / Carpenters, Principals, Plant Department, etc...)</p>	Originating	C + 1	-	2			
B01	<p>Accommodations Planning Includes records regarding the allocation of classroom and work space to staff and students. Includes planning of the effects of enrolment on accommodations, projected use of facilities and space utilization, the planning of the functional space and number of classrooms, and the planning of the physical layout of the space. (examples: Camp Korah, School Closures, Projected Classroom Organization, etc...)</p>	Plant	C + 1	3	5			
B02	<p>Building Approvals Includes documentation pertaining to the approval of building plans by the Municipality, Fire Marshall's Office, Ministry of Health, and other government bodies. (examples: site plan approvals, building permits, and municipal reports, etc....)</p>	Plant	T	-	T + 1			<p>3, 4, 5, 6, 7, 84, 98, 170, 173</p> <p>T = as long as building remains Board property.</p>

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			within department	in storage				
B03	<p>Building Improvements Includes project records regarding building improvements program and supporting documentation specific to additions, renovations, and alterations to the schools that are conducted under the program.</p> <p>Excludes: > Construction Tenders - see F29 Tenders/Quotations. > New construction - see B04 Capital Building Projects. > Building Approvals - see B02.</p>	Administration	T + 1	5	T + 6 **			<p>3 to 8, 84, 114, 120</p> <p>T = completion of project (superficial improvements); keep structural improvements as long as building remains Board property.</p>
B04	<p>Capital Building Projects Includes estimates, progress reports, certificates of clearance, project drawings, and correspondence regarding the building of schools and other properties under capital funds. Also includes capital program requests from schools, ceiling cost formulas, and impact statements.</p> <p>Excludes: > Capital Projects Financing - see F08.</p>	Administration	T + 1	5	T + 6 **			<p>3 to 8, 18, 114, 120</p> <p>T = completion of project.</p>
B05	<p>Drawings Includes all drawings and plans of schools and offices. (examples: master drawings and floor plans, site plans, aerial plans, and plans for additions and alterations)</p>	Plant	T	-	T **			<p>T = as long as building remains Board property.</p>

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			within department	in storage				
B06	<p>Emergency Includes but is not limited to records regarding emergency measures pertaining to the Board. (examples: records regarding the co-ordination of emergency measures pertaining to the Board to ensure their safety, s the co-ordination of Emergency Measures Services, Fire Safety Plans, Emergency Plans, International Crisis - Peace, etc....)</p> <p>Excludes: > Occupational Health and Safety - see B12</p>	Originator	S	-	S + 1			78
B07	<p>Environmental / Recycling Programs Includes general information on environmental awareness programs such as the Blue Box program.</p> <p>Excludes: > Hazardous wastes, testing, etc. - see B18 Substance Control/ Exposure. > Recycling contracts - see L10 Contracts and Agreements - Simple.</p>	Plant	S	-	S			
B08	<p>Inspections Includes records regarding the inspection and testing of protective equipment. (examples: fire drills and alarm tests, electrical, elevators, protective clothing, etc...)</p> <p>> Portable Fire Extinguishers > Elevator Inspection Log</p> <p>Excludes: > Air quality testing - see B18 Substance Control/Exposure.</p>	Plant	C + 2	-	C + 2			79, 80, 81, 82, 83, 84, 170, 171, 172
			P T + 5	-	P T + 5			T = date of inspection or test

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			within department	in storage				
B09	<p>Land Surveys Includes land survey information such as legal property surveys, construction layout and control surveys, and field notes. Also includes soil boring reports.</p>	Plant	S	-	S			Note: Ensure land surveys are available at local registry office before destruction
B10	<p>Maintenance Includes maintenance requisitions, work orders, job cards and all other records detailing the preventive maintenance of Board properties and buildings.</p> <p>Excludes: > Equipment - see A07. > Inspections - see B08. > Vehicles - see B19.</p>	Plant	C + 2	-	C + 2			
B11	<p>Material Safety Data Sheets Includes material safety data sheets as created and issued by the manufacturer. Legislation requires that MSDS be updated every 3 years.</p>	Plant	S	-	S + 1			89, 133, 134, 135 S = expiry;

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			within department	in storage				
B12	<p>Occupational Health and Safety Includes general records regarding the occupational health and safety of staff and students. Includes quarantines, infections, infestations, playground safety, etc.</p> <p>Excludes: > Accident Reports - see L01. > Inspections - see B08. > Material Safety Data Sheets - see B11. > WHMIS - see B18 Substance Control/Exposure.</p>	Plant	C + 1	3	5			130 to 136, 169
B13	<p>Operational Equipment Includes maintenance, disposal and other records of operational equipment used by staff members, such as lawnmowers, scrubbing machines, snow blowers, steam cleaners and vacuums.</p> <p>Excludes: > Accounts Payable - see F01. > Tenders/Quotations - see F29. > Purchase Orders - see F22.</p>	Plant	T + 2	-	T + 2			115 T = disposal of equipment.
B14	<p>Operations Includes records of the operations of buildings. (examples: environmental matters, grounds keeping, energy management, heating, ventilation, air conditioning, pest control, snow clearance, and cleaning, etc...)</p> <p>Excludes: > Occupational Health and Safety - see B12.</p>	Plant	C + 1	-	P			3 to 8 and 78 to 84

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			within department	in storage				
B15	<p>Protective Equipment Includes maintenance and history files on equipment such as breathing apparatus, special clothes, etc ...</p>	Plant	T + 1	5	T + 6			T = equipment disposed of or replaced
B16	<p>Security Includes records regarding the security of office and school facilities and properties, (examples: control of keys, trespassing, surveillance reports, and police station locations, records on school code or by-law enforcement and vendor reference checks)</p> <p>Excludes: > Property Damage Reports - see L22. > Accident Reports – see L01. > Student Disciplinary Records - see S02 Ontario Student Record</p>	Originator	C + 1	-	2	YES		29, 85, 88, 128
B17	<p>Specifications Includes technical specifications for a project or property. (examples: mechanical, electrical and structural) Includes building and fire code requirements and architect's instructions.</p> <p>Excludes: > Parts specifications - see B13 Operational Equipment.</p>	Plant	T + 1	-	T + 1			3 to 8, 106 to 121 T = as long as building remains Board property.

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			within department	in storage				
B18	<p>Substance Control/Exposure Includes records regarding the handling, storage, use and disposal of any chemical, biological or physical agents or substances. Includes Workplace Hazardous Materials Information System, hazardous materials inventories, hazardous materials assessments, records of exposure to asbestos, radon, etc, water, soil, air quality testing and monitoring and records of protective equipment use.</p> <p>Excludes: > Inspections - see B08. > Material Safety Data Sheets - see B11.</p>	Plant	C + 1	P	P			89, 133 to 161
B19	<p>Vehicles Includes records regarding all Board vehicles. (examples: maintenance records, vehicle registrations, etc...)</p>	Plant	T	T + 6	T + 6			10, 90 to 95, 105, 115 T = Vehicle is sold or disposed

HSCDSB - RETENTION SCHEDULE CURRICULUM PROGRAMS

Includes records regarding the planning and implementation of curriculum programs, program outlines, program reviews and curriculum guidelines. Also includes field trips.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
C00	<p>Curriculum Programs - General Includes records regarding curriculum programs which cannot be classified elsewhere. Use only if no other heading is available. (examples: Curriculum Consultant - District, Faith Development, Kindergarten, Literacy, etc...)</p>	Originating	C + 1	-	2			
C01	<p>Curriculum Guidelines Includes Ministry guidelines and directives specifying curriculum and areas of study or courses of study or courses of study that shall be taught in schools. Also includes procedures for the selection, approval, purchase and distribution of school textbooks, learning materials and reference and library books. Also includes lists of the foregoing materials and books. (examples: Curriculum, Homework, Secondary Curriculum/Courses)</p> <p>Excludes: > General Ministry Guidelines - see M08 Education Guidelines.</p>	Administration	S	-	S **			
C02	<p>Curriculum Planning Includes records regarding the planning of the overall curriculum or specific programs, such as meeting notes, objectives, strategy reports and teaching strategies. (examples: Day Plans, Early Years, Pathways to Success, etc...)</p>	Administration	C + 1	2	4**			T = last ministry review or audit

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C03	Curriculum Program Proposals Includes proposals for new curriculum programs, either system-wide or at the school level. Also includes material regarding comparisons with programs in other school boards, provinces, and countries. (example: Grassroots' Program)	Administration	C + 1	2	4 **			T = last ministry review or audit
C04	Curriculum Program Reviews Includes program review reports and other evaluations of specific programs in the curriculum. (examples: Assessing & Evaluation - Student Learning, Fraser Institute Ranking)	Administration	C + 1	2	4 **			T = last ministry review or audit
C05	Curriculum Writing Projects Includes proposals, correspondence and monitoring of projects for the writing of special curriculum materials. Excludes: > Curriculum Documents - see C09 Teaching Units/Curriculum Ideas.	Administration	C + 1	2	4 **			

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C06	Extracurricular/Co-Curricular Activities Includes records regarding school extracurricular activities such as clubs, choir, Student Council, and athletics. (examples: Elementary Sports, Track & Field)	School	C + 1	-	2			
C07	Field Trips/Education Outside the Classroom Includes requests, consent/permission forms, correspondence and reports regarding school field trips. Also includes correspondence and arrangements for special events related to specific programs, such as concerts, festivals, track meets, tournaments, facility tours, art or essay contests and science fairs. (examples: Searchmont Resort, Science Fairs, Public Speaking, International Field Trips, etc...) Excludes: > Transportation of students - see S06 Student Bus Routes.	Administration/ School	C + 1	2	4			
C08	Outlines / Courses of Study Includes outlines of available programs and courses of study. (examples: On-Line Learning, Holy Angles Learning Centre)	Administration	S	-	S **			33

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C09	Special Education Program (examples: Special Education Department, Special Needs Cases, Recommendations, etc...)	Special Education	C + 1	2	4 **			36
C10	Teaching Units/Curriculum Ideas Includes teaching units, lesson plans, blank examinations and testing ideas, songs, games, music sheets and other learning materials.	Administration	S	-	S			
C11	Timetables / Schedules Includes course and student timetables, examination schedules, yard duty, school year calendar and related records. (example: Secondary Schools - Staffing and Timetabling) Excludes: > Individual student exam schedules - see S02 Ontario Student Records Current and S04 Special Education Student Files.	School	S	-	S			

HSCDSB - RETENTION SCHEDULE

EDUCATION IN THE COMMUNITY/CONTINUING EDUCATION

Includes records regarding programs centred on preparing the student for involvement in the community, such as vocational guidelines , multicultural services, heritage programs, co-operative education, and educational services to the general community, such as seniors programs and continuing education

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E00	Education in the Community / Continuing Education - General Includes records regarding community programs and continuing education which cannot be classified elsewhere. Use only if no other heading is available. (example: Community Involvement, Christian Services, etc...)	Originating	C + 1	-	2			
E01	Careers Information Includes description sheets for various vocational/career choices, as well as arrangements, correspondence and materials used in the running of career days. (example: Real Game, Career Planning Program, etc...)	Administration	S	-	S			
E02	Community Education / Liaison Includes records of various programs aimed at raising the awareness of the role of education in the general community, such as Education Week, Mentorship for Immigrants and community use of schools. Also includes program reviews and reports of the activities of community liaison officers. (examples: Home Instruction, Home Schooling, Education Week, etc...) Excludes: > Community Organizations - see A01 Associations/Organizations.	School	C + 1	2	4			

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E03	<p>Continuing Education / Night School Includes records of instructional hours, refund requests, program reviews, certificates and correspondence regarding the continuing education night school courses. This may include records or provision of instruction to other institutions' students (example: University students being taught by the Board's staff.)</p> <p>Excludes: > Courses of Study - see C08 Outlines/Courses of Study. > Applications/Registrations - see S02 Ontario Student Records - Current and S04 Special Education Student Files.</p>	Administration	C + 1	2	4			
E04	<p>Continuing Education / Summer School Includes certificates, lesson units, principal's reports and correspondence concerning continuing education summer school courses.</p> <p>Excludes: > Courses of Study - see C08 Outlines/Courses of Study. > Applications/Registrations - see S02 Ontario Student Records - Current and S04 Special Education Student Files.</p>	Administration	C + 1	2	4			
E05	<p>Co-operative Education (Example: Ontario Youth Apprenticeship Program (O.Y.A.P.))</p>	Co-operative Education	T + 1	5	T + 6 **	YES		T = termination of work placement

HSCDSB - RETENTION SCHEDULE

EDUCATION IN THE COMMUNITY/CONTINUING EDUCATION

Includes records regarding programs centred on preparing the student for involvement in the community, such as vocational guidelines , multicultural services, heritage programs, co-operative education, and educational services to the general community, such as seniors programs and continuing education

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
E06	<p>Day Care Programs Includes records of Before and After School Care, day care, craft corner and related programs and day care centres in schools.</p> <p>Excludes: > Child records - see S02 Ontario Student Records (OSR) - Current</p>	Administration	C + 1	2	4 **			
E07	<p>Heritage Programs Includes objectives, program reviews, teaching materials and correspondence used in the education of students in heritage awareness such as Arabic, Italian, Vietnamese, and Black heritage programs.</p> <p>Excludes: > Class Registers - see S05 Student Attendance Registers. > Translation/Interpretation Services - see A22.</p>	Administration	C + 1	2	4			
E08	<p>Parks and Recreation Programs Includes correspondence and records of programs such as swimming and fitness made available through Municipal Parks and Recreation or the YMCA/YWCA.</p> <p>Excludes: > Leases and permits for use of school facilities - see L19 Permits / Facility Bookings.</p>	School	C + 1	2	4			

HSCDSB - RETENTION SCHEDULE

EDUCATION IN THE COMMUNITY/CONTINUING EDUCATION

Includes records regarding programs centred on preparing the student for involvement in the community, such as vocational guidelines , multicultural services, heritage programs, co-operative education, and educational services to the general community, such as seniors programs and continuing education

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
E09	Post -Secondary Education Such as Colleges and Universities	Guidance	S	-	S	YES		
E10	Safety and Health Awareness Programs Includes records of safety programs such as school safety patrol, safe arrival program, Elmer the safety elephant, anti-drug programs, AIDS information, etc. (examples: Safe Schools Initiatives, Abuse - Prevention, Abuse - Sexual, Breakfast Programs, Child Abuse, etc...)	School	C + 1	2	4			
E11	Second Language Programs Includes objectives, program reviews, teaching materials and correspondence related to the instruction of French, Italian, Spanish, Native etc... as second languages.	School	C + 1	2	4			

HSCDSB - RETENTION SCHEDULE

EDUCATION IN THE COMMUNITY/CONTINUING EDUCATION

Includes records regarding programs centred on preparing the student for involvement in the community, such as vocational guidelines , multicultural services, heritage programs, co-operative education, and educational services to the general community, such as seniors programs and continuing education

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
E12	Volunteer Development Includes records of volunteer programs such as recruitment workshops, annual receptions and volunteers activities in schools. (examples: Volunteers, Volunteer Program, Occasional Interviews - Volunteers)	Administration	C + 1	2	4	YES		85, 88, 128

HSCDSB - RETENTION SCHEDULE

FINANCE

Includes records regarding financial management, budgeting, accounting, purchasing, and all matters concerning the allocation and control of funds to departments and schools. Also includes records on tax levies and transportation costs.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
F00	<p>Finance - General Includes records regarding finance which cannot be classified elsewhere. Use only if no other heading is available. (example: Business Department - Correspondence)</p> <p>Excludes: > accounting records required to substantiate taxes payable by the Board - file by subject.</p>	Business	C + 1	-	2			
F01	<p>Accounts Payable Includes records documenting funds payable by the Board. (examples: legal fees, vendor transaction listings, payment vouchers, utilities, petty cash, remittances, invoices A - Z, etc..)</p>	Business	C + 1	5	7			18, 37, 97, 120, 177
F02	<p>Accounts Receivable Includes records documenting accounts owed to the Board such as non-resident fees, reimbursements from other boards for teachers on assignment, and cafeteria register tapes. Also includes the monies owed to the Board for transportation and tuition of students charged back to other Boards/Municipalities.</p> <p>Excludes: > Night School Registrations - see S02 Ontario Student Records - Current and S04 Special Education Student Files.</p>	Business	C + 1	5	7			18, 37, 97, 120

HSCDSB - RETENTION SCHEDULE

FINANCE

Includes records regarding financial management, budgeting, accounting, purchasing, and all matters concerning the allocation and control of funds to departments and schools. Also includes records on tax levies and transportation costs.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
F03	<p>Assessments / Taxation Includes records relating to allocation of tuition and costs to other School Boards, such as the local property assessment base, equalized assessment, payments deemed to be in lieu of taxes, telephone and telegraph payments. Also includes records on supplementary taxes and tax deficiencies</p> <p>Excludes: > Transportation and Tuition Charge-Backs - see F02 Accounts Receivable.</p>	Business	C + 1	5	7			18, 37, 97, 120
F04	<p>Assets Includes records regarding current and fixed assets owned by HSCDSB. Includes furniture and equipment and other inventories as well as records of depreciation and amortization and records relating to the transfer of fixed assets between departments.</p> <p>Excludes: > Capital Expenditures - see F08 Capital Projects Financing. > Contracts/Agreements - see L10 or L11.</p>	Business	T + 2	T + 4	T + 6		YES	18, 37, 97, 120 T = disposal of asset
F05	<p>Audits Includes records regarding internal and external financial audits of accounts.</p> <p>Excludes: > Audited Financial Statements - see F15 Financial Statements.</p>	Business	C + 1	5	7		YES	18, 37, 97, 120

HSCDSB - RETENTION SCHEDULE

FINANCE

Includes records regarding financial management, budgeting, accounting, purchasing, and all matters concerning the allocation and control of funds to departments and schools. Also includes records on tax levies and transportation costs.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
F06	Banking Includes records regarding banking transactions and relationships with banks. (examples: bank statements, bank reconciliation, deposit records, cancelled cheques, cheque stubs and money order rates)	Business	C + 1	5	7			18, 37, 97, 120
F07	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.	Business	C + 1	5	7		YES	18, 37, 97, 120
F08	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. Excludes: > Final Cost Statements - see F15 Financial Statements.	Business	T + 1	5	T + 6			18, 37, 97, 120 T = completion of project.

HSCDSB - RETENTION SCHEDULE

FINANCE

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Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
F09	<p>Capital Revenue Includes sale of property and rental income from leased premises.</p> <p>Excludes: > Property Matters - see L23.</p>	Business	C + 1	5	7			18, 37, 97, 120
F10	<p>Cash Receipts Includes receipts issued by the Board to those who have paid cash to the Board.</p>	Business	C + 1	5	7	YES		18, 37, 97, 85, 88, 120, 128
F11	<p>Cheque Requisitions Includes all cheque requisitions and supporting documents used to authorize the issuance of cheques by the Board. Includes accounts payable invoices, credit notes, payment vouchers, credit card statements etc.</p> <p>Excludes: Cheques - see F12</p>	Business	C + 1	5	7			18, 37, 97, 120

HSCDSB - RETENTION SCHEDULE

FINANCE

Includes records regarding financial management, budgeting, accounting, purchasing, and all matters concerning the allocation and control of funds to departments and schools. Also includes records on tax levies and transportation costs.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
F12	<p>Cheques Includes all cancelled cheques issued by the Board. Also includes any copies of cancelled cheques. Records associated with the support of the reconciliation of all financial transactions, used to provide a proper audit trail. This record series may include all records relating to issuance of cheques, such as returned cheques, trust cheques and cancelled cheques.</p> <p>Excludes: > Banking - see F06 > Cheque Requisitions - see F11</p>	Business	C + 1	5	7			18, 37, 97, 120, 175 to 178
F13	<p>Debentures / Bonds Includes records regarding the debentures and bonds issued. Includes information on the initial issuance of the debenture or bond and records of payments made to investors.</p>	Business	T + 1	5	T + 6			18, 37, 97, 120 T = after redemption of issue.
F14	<p>Employee and Trustee Expenses Includes car allowances and other expenses submitted by employees and trustees for reimbursement. Includes Petty Cash float, reimbursement etc..</p>	Business	C + 1	5	7			18, 37, 97, 120

HSCDSB - RETENTION SCHEDULE

FINANCE

Includes records regarding financial management, budgeting, accounting, purchasing, and all matters concerning the allocation and control of funds to departments and schools. Also includes records on tax levies and transportation costs.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
F15	<p>Financial Statements Includes the Balance Sheet, Income Statement, Statement of Source and Application of Funds, and other audited financial statements.</p> <p>Excludes: > Financial Working Papers - see F16.</p>	Business	C + 1	P	P			18, 37
F16	<p>Financial Working Papers Includes all drafts, calculations, grant calculations and other working papers associated with the development of financial statements for the Board.</p>	Business	C + 1	5	7			18, 37
F17	<p>General Ledger Includes all records in the books of original entry, whether maintained in book format or as a computer report.</p>	Business	C + 1	P	P		YES	18, 37

HSCDSB - RETENTION SCHEDULE

FINANCE

Includes records regarding financial management, budgeting, accounting, purchasing, and all matters concerning the allocation and control of funds to departments and schools. Also includes records on tax levies and transportation costs.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
F18	<p>Grants / Subsidies / Funding Includes records pertaining to all provincial funding, grant programs, transportation subsidies and community support fund. (examples: Grant Proposals, Ministry of Education)</p> <p>Excludes: > Agreements - see L11 Contracts and Agreements – Under Seal.</p>	Business	C + 1	5	7			18, 37, 97, 120 T = expiry of grant period.
F19	<p>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.</p>	Business	T + 1	5	T + 6		YES	18, 37, 97, 120 T = after closure of account.
F20	<p>Journal Entries / Vouchers Includes completed journal voucher forms, input forms, and all background documentation used to substantiate journal entries.</p>	Business	C + 1	5	7		YES	18, 37, 97, 120

HSCDSB - RETENTION SCHEDULE

FINANCE

Includes records regarding financial management, budgeting, accounting, purchasing, and all matters concerning the allocation and control of funds to departments and schools. Also includes records on tax levies and transportation costs.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
F21	<p>Payroll Includes all records of payments of salary, wages and deductions to employees. Includes payroll master records (PMRs), employment insurance records, payroll update logs, hold backs, and payroll deduction and billing reports. Also includes T4s, TD1s and T2200s. (examples: Canada Savings Bonds, Garnishee, Revenue Canada, Teachers Pension Plan, etc...)</p>	Business	C + 1	5	7	YES		7, 9, 37, 39, 40, 41, 42, 56, 60, 61, 62, 63, 64, 65, 68, 69, 70, 71, 85, 88, 97, 120, 128, 180, 183
F22	<p>Purchase Orders Includes purchase orders and blanket orders authorizing the procurement of goods and services. (examples: Completed Orders, Newspaper Ads, etc..)</p> <p>Excludes: > Tenders/Quotations - see F29. > Purchase Order Registers - see F27 Subsidiary Ledgers, Registers and Journals.</p>	Business	C + 1	5	7			18, 37, 97, 120
F23	<p>Purchasing Records related to requests for proposal, proposal review, inspection of merchandise, etc. (example: Cafeteria Services)</p> <p>Excludes: > Accounts Payables and Receivables - see F01 and F02. > Purchasing Contract - see L10 Contracts and Agreements - Simple.</p>	Purchasing	T + 1	5	T + 6			18, 37, 97, 120 T = Termination of the proposal process by granting the contract or cancellation. Non - winning proposals remain the property of the submitter and are returned or destroyed.

HSCDSB - RETENTION SCHEDULE

FINANCE

Includes records regarding financial management, budgeting, accounting, purchasing, and all matters concerning the allocation and control of funds to departments and schools. Also includes records on tax levies and transportation costs.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
F24	Records of Assessment Includes records of names, addresses and school support direction for ratepayers for public school or Catholic school supporters. Also includes Street Index Guide, alphabetical listings, analysis of assessment, and mill rates.	Business	S + 1	-	S + 1	YES		37, 85, 88, 128
F25	School Support Includes records relating to the direction of school support. Records include conflict reports of school support for Catholic and Public School Boards, applications for the direction of school support, admit/demit lists, Assessment Review Board appeals, Transfers and Transportation completed forms, etc. Also includes information on corporation support, non-resident information and extended funding.	Business	C + 1	-	7	YES		18, 26, 37, 85, 88, 97, 120, 128
F26	Student Council Funds Includes records on funds allocated to or raised by the Student Council. Records consist of accounts receivable and payable documents such as invoices and vouchers.	School	C + 1	5	7			18, 37, 97, 120

HSCDSB - RETENTION SCHEDULE

FINANCE

Includes records regarding financial management, budgeting, accounting, purchasing, and all matters concerning the allocation and control of funds to departments and schools. Also includes records on tax levies and transportation costs.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
F27	<p>Subsidiary Ledgers, Registers and Journals Includes all subsidiary ledgers, registers and journals such as Payment and Receipt Journals and Payroll Registers, and Purchase Order Registers. Also includes year end adjustments.</p> <p>Excludes: > Journal Entries - see F20 Journal Entries/Vouchers.</p>	Business	C + 1	5	7		YES	18, 37, 97, 120
F28	<p>Taxation Includes records documenting taxation such as federal sales tax tables. Also includes Provincial Sales Tax (PST) and Goods and Services Tax (GST) accounting.</p>	Business	C + 1	5	7	YES	YES	18, 37, 39, 40, 41, 42, 75, 76, 77, 97, 98, 100, 120
F29	<p>Tenders / Quotations Includes records regarding quotations and tenders obtained from suppliers of goods and services, such as office supplies, construction and pest control. Includes Requests for Proposal, Request for Quotations, Specifications, Invitations to Tender, Proposals, Tender Submissions, bid and performance bonds, and all documentation regarding the selection process.</p> <p>Single Sourced Quotations for tested products i.e. wax, chemicals, etc... Excludes: > Vendors/Suppliers/Caterers - see A24. > Contracts - see L10 Contract and Agreements – Simple or L11 Contract and Agreements – Under Seal.</p>	<p>Purchasing</p> <p>Purchasing</p>	T + 1	5	7		YES	18, 37, 97, 120 T = Termination of Agreement. Unsuccessful tenders 1 year; specifications selected for future planning.

HSCDSB - RETENTION SCHEDULE

FINANCE

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Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
F30	<p>Transportation 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 Lines Operators. Records include quarterly review documents.</p> <p>Excludes: > Transportation and tuition charge backs - see F02 Accounts Receivable. > Student Bus Routes - see S04. > Original Contract - see L11 Contracts and Agreements–Under Seal.</p>	Business	C + 1	5	7			18, 37, 97, 120
F31	<p>Donations / Scholarships Funds Bequests Includes records regarding monetary donations for Scholarships or other purposes deemed by the donor or Board.</p>	Business	T + 1	5	T + 6	YES		18, 37, 96, 97, 120 T = winding up of fund/bequest
F32	<p>Levy Includes records regarding revenue collected by the Board in the form of levies imposed upon local organizations (cities, townships etc ...)</p> <p>Excludes: > Subsidies - see F18 Grants / Subsidies / Funding</p>	Business	C + 1	P	P			37

HSCDSB - RETENTION SCHEDULE

HUMAN RESOURCES

Includes records regarding the Board's relationship with its employees. Includes records regarding general staff programs as well as information on specific employees.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
H00	<p>Human Resources - General Includes records regarding Personnel matters which cannot be classified elsewhere. Use only if no other heading is available. (example: Human Resources Correspondence - General)</p>	Originating	C + 1	-	2			
H01	<p>Attendance and Scheduling Includes records regarding employee attendance, absences, scheduling, call-outs and hours of work. Includes weekly absenteeism reports, Clerical Assistance Requests, reports from the Personnel Attendance System.</p> <p>Excludes: > Time Cards - see F21 Payroll.</p>	Human Resources	C + 1	-	2	YES		85, 88, 128 Year-end attendance added to employee records.
H02	<p>Benefits Includes brochures, rates, quotes, correspondence and explanatory documents regarding benefits offered to employees such as group insurance, dental plans, Employee Assistance Program, benefit rate changes and premium adjustments. (example: enrolment OMERS)</p> <p>Excludes: > Benefit Records of Specific Employees - see H10 Employee Record.</p>	Human Resources	S	-	S **			

HSCDSB - RETENTION SCHEDULE

HUMAN RESOURCES

Includes records regarding the Board's relationship with its employees. Includes records regarding general staff programs as well as information on specific employees.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
H03	<p>Benefit Claims Includes claims and supporting documentation. (example: Canada Life Claims)</p> <p>Excludes: > WSIB Claims - see H38 WSIB Claims / Rehabilitation. > Long Term Disability (LTD) - see H15 Long Term Disability Claims.</p>	Human Resources	T + 1	5	T + 6	YES	85, 88, 128 T = Claim completed	
H04	<p>Certification Records related to certification of individuals to perform certain tasks. (examples: Ministry of Education, Teacher Personnel Qualifications, Occasional Teacher renewals, etc...)</p>	Human Resources	S & T		T	YES	85, 88, 128, 162 S = Annual Certification T = Termination of employee service	
H05	<p>Direct Deposit Authorizations (DDA) Includes original signed Direct Deposit Authorizations for employees / trustees only.</p> <p>Note: This record is filed within the "Pay" section of the employees' Personnel File and within the Trustees file.</p>	Human Resources	T + 1	5	T + 6	YES	18, 37, 97, 120, 85, 88, 128 T = Termination of employee service	

HSCDSB - RETENTION SCHEDULE

HUMAN RESOURCES

Includes records regarding the Board's relationship with its employees. Includes records regarding general staff programs as well as information on specific employees.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
H06	<p>Employee Complaints / Harassment / Human Rights Includes: Official complaint, backup documentation, union/legal correspondence and disposition.</p>	Human Resources	T	6	T + 6	YES		85, 88, 128 T = Termination of employment These files are NOT part of the employee file.
H07	<p>Employee Claims Includes records regarding claims initiated by employees regarding Legal Issues.</p> <p>Excludes: Grievances - see H32 Union - Grievances and Arbitration.</p>	Human Resources	T	P	P	YES		66, 72, 85, 88, 128
H08	<p>Employee - Medical Record - General Medical records related to treatment, examinations, history, etc. related to general medical matters.</p> <p>Excludes: > Accident/Injury Reports - see L01 Accident Reports.</p>	Human Resources	T + 20		T + 20	YES	YES	85, 88, 128

HSCDSB - RETENTION SCHEDULE

HUMAN RESOURCES

Includes records regarding the Board's relationship with its employees. Includes records regarding general staff programs as well as information on specific employees.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
H09	<p>Employee - Pension Record Includes OMERS annual member's statement for each employee, retirement income calculation and any supporting documentation.</p> <p>Excludes: > Pension Plans - see H17 Pension / Superannuation. > Employee Retirement - see H21 Retirement</p>	Human Resources	T + 1	5	T + 6	YES	YES	9, 85, 88, 128 T = Employee deceased & all beneficiaries paid or pension transferred to another institution Annual statements retained 1 year
H10	<p>Employee Record Includes records regarding the employment history of Board or school employees and trustees. Includes initial resume and applications, internal applications, copies of benefit enrolment forms, copies of salary calculation forms, change advice, report of accidental injury, employee master record cards, certification of level placement, probationary contract, employee evaluations, key tasks, and employee verification forms. Also includes workers compensation settlement reports, long-term disability insurance claims, claim summaries and disbursements. Includes teaching and support staff. (example: Personnel File - See Sample Folder)</p> <p>Note - The official copy of the Record may consist of one or more files: a main folder, Long-Term Disability folder and WSIB folder. Note - The main folder is divided in six sections: Hiring Information, Correspondence, Pay, Benefits, Training & Development and Performance Review Note - RRSP Enrolment Forms and Retired Employee Banking Info. are located in binders in the Benefit Administrators office. Excludes: > Salary and Deductions - see F21 Payroll.</p>	Human Resources	T + 2	T + 48	T + 50	YES	YES	9, 65, 67, 68, 69, 70, 71, 85, 88, 96, 114, 115, 120, 128, 181, 182, 183 T = Death of the last surviving beneficiary of the employee's pension policy

HSCDSB - RETENTION SCHEDULE

HUMAN RESOURCES

Includes records regarding the Board's relationship with its employees. Includes records regarding general staff programs as well as information on specific employees.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
H11	<p>Employment Equity Includes records regarding affirmative action such as workshop packages, questionnaires and plans, strategies, correspondence with affirmative action contact representatives and reports.</p>	Human Resources	C + 1	2	4			43 to 59
H12	<p>Health and Safety Includes records regarding occupational health and safety of staff. Includes WHMIS and information on health and safety training programs for staff.</p> <p>Excludes: > Accident Reports - see L01. > Claims/Litigation - see L06. > Emergency Procedures - see M17 Policies/Procedures/Guidelines. > Inspections - see B08. > Material Safety Data Sheets - see B11. > Student Health Records - see S02 Ontario Student Records - Current and S04 Special Education Student Files. > WHMIS - see B18 Substance Control/Exposure.</p>	Human Resources	C + 1	5	7	YES	YES	85, 88, 128, 131
H13	<p>Job Descriptions / Tasks Includes job descriptions and specifications as well as background information used in their preparation or amendment. Also includes positions of responsibility and assigned tasks.</p>	Human Resources	S	-	S **		YES	

HSCDSB - RETENTION SCHEDULE

HUMAN RESOURCES

Includes records regarding the Board's relationship with its employees. Includes records regarding general staff programs as well as information on specific employees.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
H14	<p>Leaves of Absence Includes records regarding employee entitlements, salary leave plans, requests, planners and correspondence related to leaves (examples: bereavement, personal, educational, pregnancy/parental/adoptive, sabbaticals, teacher exchange etc...)</p> <p>Excludes: > Attendance – see H01 Attendance and Scheduling. > Vacations - see H37. > Employee Records – see H10.</p>	Human Resources	T + 3	-	T + 3	YES		71, 85, 88, 128
H15	<p>Long Term Disability Claims Includes correspondence leading up to and including all Long Term Disability Claims (LTD) and OMERS Disability files. These records are kept alphabetically by employee name.</p> <p>Excludes: > Health & Safety - Accidents/Injuries - see L01 Accident Reports > Pension - see H17 Pension / Superannuation. Note: This documentation is filed within the "Benefits" section of the employees' Personnel File or in a separate folder labelled "LTD" due to the volume of documentation.</p>	Human Resources	T + 2	T + 48	T + 50	YES	YES	85, 88, 128
H16	<p>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.</p>	Human Resources	S + 1	-	S + 1	YES		43 to 59, 85, 88, 128

HSCDSB - RETENTION SCHEDULE

HUMAN RESOURCES

Includes records regarding the Board's relationship with its employees. Includes records regarding general staff programs as well as information on specific employees.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
H17	<p>Pension / Superannuation</p> <p>Includes general information on OMERS, TPP and other annuity or superannuation plans and annual information returns. Original annual statements are sent to each member. Includes original pension policies, valuations, contribution reports, adjustments, administrator reports, cumulative years of service, total pension contributions, accrued benefits etc...</p> <p>Excludes: > Deductions - see F21 Payroll. > Employee Pension Records - see H10. > Employee Retirement - see H21 Retirement.</p>	Human Resources	P	-	P	YES	YES	9, 85, 88, 128, 164
H18	<p>Performance Management</p> <p>Records relating to performance management, staff supervisory and management performance reviews. Includes discipline and discharge documentation.</p> <p>Note: Performance Management documentation related to the following positions: Director of Education, Superintendent of Education and System Administrator is managed by the Director of Education:</p>	Human Resources Director of Education	T	6	T + 6	YES		31, 85, 88, 120, 128 T = Termination of Employee Service
H19	<p>Positions</p> <p>Includes records associated to specific positions. (examples: Educational Assistants / Student Needs Assessment Assistants, Tutors in the Classroom)</p> <p>Excludes: > Job Descriptions - see H13. > Training and Development - see H25 Staff Development.</p>	Human Resources	C + 1	2	4			

HSCDSB - RETENTION SCHEDULE

HUMAN RESOURCES

Includes records regarding the Board's relationship with its employees. Includes records regarding general staff programs as well as information on specific employees.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
H20	<p>Recruitment / Selection</p> <p>Includes records regarding the recruitment of staff. Includes job postings, copies of advertisements, records regarding competitions, applications, resumes, applicant evaluations and orientation.</p> <p>Excludes: > Successful applicants - see H10 Employee Record and H27 Temporary Employment.</p>	Human Resources	C + 2	-	3	YES		45, 46, 47, 53, 85, 88, 128
H21	<p>Retirement</p> <p>Includes records associated with termination of employment due to retirement. Includes records detailing pension obligations due to individuals under the Ontario Municipal Employees Retirement System (O.M.E.R.S.) and the Teachers' Pension Plan Board (T.P.P.B.)</p> <p>Excludes: > Pension Plans - see H17 Pension/Superannuation. > Deductions - see F21 Payroll. > General Pension Information - see H17 Pension/Superannuation.</p>	Human Resources	T	6	T + 6	YES	YES	85, 88, 128 T = Death of employee/beneficiary
H22	<p>Salary Administration</p> <p>Includes records regarding the planning and scheduling of salaries, such as job evaluations, job classification systems, salary surveys and schedules, salary increments, service pay and substitution pay. Also includes statistics, program ideas, and compensation strategies. Includes Workplace Safety & Insurance Board (WSIB) information.</p> <p>Excludes: > Employee Record - see H10. > Pay Equity - see H16.</p>	Human Resources	C + 1	2	4	YES		39, 40, 41, 42, 60, 61, 85, 88, 97, 98, 99, 100, 103, 120, 128

HSCDSB - RETENTION SCHEDULE

HUMAN RESOURCES

Includes records regarding the Board's relationship with its employees. Includes records regarding general staff programs as well as information on specific employees.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
H23	<p>Severance Programs Includes calculations, agreement and correspondence for employees considering or taking advantage of a Voluntary Severance Incentive Program and Early Retirement Incentive Program.</p>	Human Resources	T + 1	5	T + 6	YES	YES	85, 88, 128 T = Termination of employment
H24	<p>Staff Allocation / Staff Lists Includes records concerning the allocation of staff within the system. Also includes staff lists such as staff directories, non-union seniority lists, retirement lists and lists of supply teachers.</p>	Human Resources	S + 1		S + 1	YES		85, 88, 128
H25	<p>Staff Development Includes records regarding courses and conferences facilitated by the Board for staff development and information on career and professional development programs. Also includes orientation materials and staff development calendars.(examples: Professional Development, Summer Institute for Principals)</p>	Human Resources	C + 1	2	4			35

HSCDSB - RETENTION SCHEDULE

HUMAN RESOURCES

Includes records regarding the Board's relationship with its employees. Includes records regarding general staff programs as well as information on specific employees.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
H26	<p>Staff Planning Includes records of succession planning, executive placement, retirement programs, staff turnover rates, annual hire/promotion targets, recruitment freezes, employment equity, performance management and related records.</p> <p>Excludes: > Employee Record - see H10.</p>	Human Resources	C + 1	3	5	YES		85, 88, 128
H27	<p>Temporary Employment Includes correspondence, requests for temporary help, lists of floater secretaries, typing tests, and other records regarding temporary employees of the Board. Includes records on student or practice teachers and summer students.* (example: Student Teacher Placements)</p> <p>Excludes: > Time sheets, see F21 Payroll.</p>	Human Resources *Superintendent of Education	T + 2	4	T + 6	YES		9, 65, 67, 68, 69, 70, 71, 85, 88, 96, 114, 115, 120, 128, 181, 182, 183 T = Termination of employment
H28	<p>Transfers / Placements / Promotions Includes records concerning the transfer, placement, promotion, and selection of employees within the system. Includes requests and appeals.</p>	Human Resources	C + 1		2	YES		85, 88, 128

HSCDSB - RETENTION SCHEDULE

HUMAN RESOURCES

Includes records regarding the Board's relationship with its employees. Includes records regarding general staff programs as well as information on specific employees.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
H29	<p>Union - General Includes: Copy of current signed collective agreement, general correspondence, memorandum of agreements/policies. Also includes union management meetings, seniority adjustments, seniority lists and union time off for each union.</p> <p>Excludes: > Original Collective Agreements - see L11 Contracts and Agreements Under Seal > Union Bargaining Records - see H30.</p>	Human Resources	C + 11	-	C + 11			
H30	<p>Union - Bargaining Records Includes: A copy of the signed collective agreement, union and management proposals, costings and survey data, agreed upon items, union and legal correspondence and notes.</p> <p>Excludes: > Union Files - see H29 Union - General.</p>	Human Resources	T	20	T + 20		YES	
H31	<p>Union - Collective Agreement Administration Includes records regarding the administration and interpretation of the Board's collective agreements. Includes, implementation plans, sub plans, and related records.</p> <p>Excludes: > Grievances & Arbitrations - see H32. > Collective Agreements - see L11 Contracts and Agreements - Under Certification Documents - see H33 Union - Labour Certification. > Salary Schedule - see H22 Salary Administration. > Negotiations - see H34 Union - Negotiations.</p>	Human Resources	T + 2	-	T + 2			T = Termination of contract period;

HSCDSB - RETENTION SCHEDULE

HUMAN RESOURCES

Includes records regarding the Board's relationship with its employees. Includes records regarding general staff programs as well as information on specific employees.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
H32	<p>Union - Grievances and Arbitration</p> <p>Includes records regarding grievances filed by employees such as evaluation reports, notifications, correspondence with union concerning grievance initiators and legal opinions and memorandum of settlements.</p>	Human Resources	T	20	T + 20	YES	YES	85, 88, 128 T = Resolution/ withdrawal of grievance
H33	<p>Union - Labour Certification</p> <p>Includes original documents concerning the certification of labour unions.</p>	Human Resources	P	-	P			
H34	<p>Union - Negotiations</p> <p>Includes records regarding collective bargaining with the unions representing the Board's employee groups. Includes final offers, memoranda of settlement, mediations, arbitrations, and scattergrams used in preparations for bargaining. Also includes documentation on strikes.</p> <p>Excludes: > Collective Agreement - see L10 Contracts and Agreements - Simple.</p>	Human Resources	T	20	T + 20			T = Termination of the contract period; retention based on research needs.

HSCDSB - RETENTION SCHEDULE

HUMAN RESOURCES

Includes records regarding the Board's relationship with its employees. Includes records regarding general staff programs as well as information on specific employees.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
H35	<p>Union - Strike Plans Includes: Official strike plan, strike committee meeting minutes, list of management home address and phone numbers, correspondence and notes</p>	Human Resources	P		P			
H36	<p>Unsolicited Resumes Includes solicited and unsolicited application/resumes. For accepted application see Employee Records.</p> <p>Excludes: > Recruitment/Selection - see H20.</p>	Human Resources	C		C	YES	85, 88, 128	
H37	<p>Vacation / In-Lieu Includes records regarding employee vacations and/or time off in-lieu. Records include requests, schedules/planners and correspondence.</p> <p>Excludes: > Attendance - see H01 Attendance and Scheduling. > Employee Record - see H10.</p>	Human Resources	T + 3	-	T + 3	YES	70, 85, 88, 128	

HSCDSB - RETENTION SCHEDULE

HUMAN RESOURCES

Includes records regarding the Board's relationship with its employees. Includes records regarding general staff programs as well as information on specific employees.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
H38	<p>WSIB Claims / Rehabilitation</p> <p>Includes Form 7, attending physician reports, benefits history, current injury/accident details, accident investigation reports, WSIB reports, correspondence and return to work certifications.</p> <p>Excludes: > WSIB Payments - see F01 Accounts Payable</p> <p>Note: This documentation is filed within the "Benefits" section of the employees' Personnel File or in a separate folder labelled "WSIB" due to the volume of documentation.</p>	Human Resources	T + 1	5	T + 6	YES	YES	85, 88, 128, 181, 182 T = death of employee and all beneficiaries

HSCDSB - RETENTION SCHEDULE INFORMATION TECHNOLOGY

Includes records regarding Information Technology systems of the Board.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
100	Information Technology - General Includes but is not limited to Information Systems records which cannot be classified elsewhere. Used only if not other heading is appropriate and available. (examples: Computer Department, Computer Surveys)	Systems Administrator	C + 1		2			None
101	Application Development / Implementation / Operations Includes: Intranet/Internet and Tracking Systems. Also includes Database Administration such as Accounts, Privileges, Maintenance and Modelling.	Systems Administrator	T+1		T+1		YES	T = until data from discontinued program is no longer required
102	Business Systems - Design / Development Records related to the design and development of business systems including financial and office business systems. Includes documentation and manuals	Systems Administrator	T	1	T +1			None

HSCDSB - RETENTION SCHEDULE INFORMATION TECHNOLOGY

Includes records regarding Information Technology systems of the Board.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
103	<p>Business Systems - Operation Records related to the operation of business systems and their applications including quality control and testing. Includes documentation and manuals</p>	Systems Administrator	SUP	1	SUP + 1			None
104	<p>Computers - General Includes: Correspondence of a general nature. Also includes request form for PC Hardware/Software and Network support.</p> <p>Excludes: Information Technology - Hardware/Software Administration - see I07; Instruction Manuals - see I10; Information Technology - Standards - see I09.</p>	Originator	C + 1		2			
105	<p>Computer / Information Systems Includes records regarding all types of information systems in use. Includes information on system design and implementation, office automation, and program listings. Also includes computer maintenance records, flow charts, file layouts and requests for modification and upgrades, inventories of network equipment and user I.D.s and hardware and software designations and summaries.</p> <p>Excludes: > Reports - file by subject. > Backup Tapes - identify by subject. > Maintenance Contracts - see L10 Contracts and Agreements - Simple.</p>	Systems Administrator	S+1	-	S+1			GST Memo 500-1-2 "Computerized Records".

HSCDSB - RETENTION SCHEDULE INFORMATION TECHNOLOGY

Includes records regarding Information Technology systems of the Board.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
106	<p>Information Systems Includes but is not limited to records regarding information systems, computer hardware, computer software, data transmission, software evaluations, instructional material used by the Board.</p> <p>Excludes: > Communication Systems - see I11 - Telephone/Voice Mail Systems > Information Technology - Services Requests - see I08 > Contracts/Agreements - see L10 and L11 > Tenders/Quotations - see F29 > Vendors and Suppliers - see A24 Vendors/Suppliers/Caterers</p>	Systems Administrator	S		S			None
107	<p>Information Technology - Hardware / Software Administration Includes: System specification and requirements and LAN/WAN, Network administration such as acquisitions, installation, licensing and upgrades. Also includes Network Operations including accounts, backup, restore and tuning, mainframe, midrange and PC programming information and packaged product information, system specifications and system development documentation. Also contains documentation of changes made due to changes in the legislation.</p> <p>Excludes: > Computers - General - see I04; > Information Technology - Standards - see I09. > Instruction Manuals - see I10;</p>	Systems Administrator	T+1		T+1			T=until discontinuation of hardware/software All historical data related to the discontinued program is to be either converted to be "new software compatible" or it is confirmed by management that such historical information will no longer be required for reference purposes.
108	<p>Information Technology - Services Requests (ITSR's) For additional hardware/software, service call information on hardware and software, etc. used by the Board. This information will include quotes for specialized items not covered by Tender. Daily and bi-weekly reports used internally for analyses.</p>	Systems Administrator	C + 1	2	4			None

HSCDSB - RETENTION SCHEDULE INFORMATION TECHNOLOGY

Includes records regarding Information Technology systems of the Board.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
109	<p>Information Technology - Standards Includes: Board-wide approved standards for hardware and software. Also includes standards for security, access, data backup and disaster recovery.</p>	Systems Administrator	S+1		S+1		YES	
110	<p>Instruction Manuals Includes: Computer hardware manuals and equipment manuals for photocopiers, fax machines, microfilm reader/printer, etc.</p> <p>Excludes: > Information Technology - Standards - see 109.</p>	Originator	S		S			Existing manuals for software are not to be destroyed until the updated software has been received, installed and tested in the computer operating environment. Existing manuals for hardware are not to be destroyed until the related hardware is sold or formally scrapped.
111	<p>Telephone & Voice Mail Systems Records related to telephone and voice mail systems technology, application programs and reports.</p>	Systems Administrator	SUP	0	SUP			

HSCDSB - RETENTION SCHEDULE

LEGAL

Includes records regarding legal matters as well as contracts and agreements, insurance and real estate matters. Also includes Federal and Provincial legislation affecting or of interest to the Board.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
L00	<p>Legal – General Includes records regarding legal affairs which cannot be classified elsewhere. Use only if no other heading is available. (example: Legal Costs)</p>	Originating	C + 2	-	3			
L01	<p>Accident Reports Includes reports of staff* or student** accidents that occur on Board property such as at schools or on school trips. (example: Ontario School Board Insurance Exchange)</p> <p>Excludes: > Claims/Litigation - see L06. > Workers' Compensation Claims and Reports - see H38</p>	<p>* Human Resources</p> <p>** Business</p>	C + 2	17	20	YES	85, 88, 92, 115, 128, 181, 182	<p>If applies to student keep until student is age 18 and report is at least 2 years old; If applies to staff transfer to employee record</p>
L02	<p>Acts / Regulations 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. Includes the Copyright Act. (examples: Conflict of Interest, Bill 160, Criminal Background Check Regulation, etc...)</p> <p>Excludes: > Stock copies for placement in central reference area. > Ministry of Education Guidelines - see M08 Education Guidelines.</p>	Originating	S	-	S		YES	

HSCDSB - RETENTION SCHEDULE

LEGAL

Includes records regarding legal matters as well as contracts and agreements, insurance and real estate matters. Also includes Federal and Provincial legislation affecting or of interest to the Board.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
L03	<p>Advice / Opinions - General This includes advice and legal opinions provided by Lawyers to HSCDSB.</p>	Originating	C + 2	P	P	YES		
L04	<p>Appeals / Hearings Includes records of hearings conducted by the Ministry of Education as a result of a request by a student or parent or guardian for the removal or correction of information on the OSR, with which the principal refused to comply. Records include the hearing proceedings, the final decision, suspension appeals and O.M.B. hearings.</p> <p>Excludes: > Correspondence regarding corrections or removal of information not involving a hearing, see S02 Ontario Student Records (OSR). > Staff transfer appeals - see H07 Employee Claims. > Assessment Review Board Appeals - see F25 School Support.</p>	Board Secretary	T	5	T + 5		YES	T = final resolution.
L05	<p>Business Organization - General Records related to the creation and formal proceedings of the Board. (example: Amalgamation of School Boards, HSCDSB)</p>	Board Secretary	C + 2	T	T			26, 114 T = Termination of the HSCDSB.

HSCDSB - RETENTION SCHEDULE

LEGAL

Includes records regarding legal matters as well as contracts and agreements, insurance and real estate matters. Also includes Federal and Provincial legislation affecting or of interest to the Board.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
L06	<p>Claims / Litigation Includes all liability claims made by employees and other parties against the Board or by the Board against other parties. Also includes documentation regarding all litigation cases against or by the Board. (example: Children's Aid - Allegations of Abuse / Assault / Inappropriate Behaviour by Staff)</p> <p>Excludes: > Accident Reports - see L01. > Workers' Compensation, Long Term Disability - see H10 - Employee Records & H07 Employee Claims.</p>	Administration	T + 1	19	T + 20	YES	YES	113 T = resolution of claim.
L07	<p>Compliance Records related to the preparation of documents required by law. Includes reporting and external audits required by the Board, etc.</p> <p>Excluded: > Tax Returns - see L08 - Compliance - Tax Returns</p>	Originating	T + 2	T	T			20, 21, 132 T = Termination of the agency.
L08	<p>Compliance - Tax Returns Tax returns filed for sales, income, severance, etc.</p> <p>Excludes: > Accounting Records see - F01 Accounts Payable</p>	Business	C + 2	5	7			39, 40, 41, 42, 74, 75, 76, 77, 97, 98, 99, 100, 101, 102, 103 T = Termination of the agency.

HSCDSB - RETENTION SCHEDULE

LEGAL

Includes records regarding legal matters as well as contracts and agreements, insurance and real estate matters. Also includes Federal and Provincial legislation affecting or of interest to the Board.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
L09	<p>Compliance - Orders - Agency/Court Records related to original orders, decisions and judgements issued to the Board.</p> <p>Note: Employee Marriage, Divorce or Annulment record is filed within the "Benefit" section of the employees' Personnel File Note: Employee Garnishment of Wages is filed within the "Pay" section of the employees' Personnel File Note: Custody Issues related to students are filed at the School</p> <p>Excludes: > Hearing/Proceedings - see L15.</p>	Human Resources or School	P		P			
L10	<p>Contracts and Agreements - Simple Includes contracts and agreement not under corporate seal, such as equipment rental and service contracts, and vehicle lease and purchase agreements. Also includes records which substantiate the fulfillment of the agreement. (examples: Principals / Vice-Principals, Supervisory Officers)</p>	Administration	T + 1	5	T + 6	YES	YES	114, 120 T = expiry of agreement Dr. Somme would like kept as permanent retention
L11	<p>Contracts and Agreements - Under Seal Includes contracts and agreements under seal such as union collective agreements, leases, and other special agreements. Includes contracts with Bus Operators and agreements with the Provincial Government regard use of grants.</p> <p>Excludes: > Land purchase agreements – see L23 Property Matters.</p>	Administration	T + 1	19	T + 20	YES	YES	111, 112, 121 T = expiry of agreement

HSCDSB - RETENTION SCHEDULE

LEGAL

Includes records regarding legal matters as well as contracts and agreements, insurance and real estate matters. Also includes Federal and Provincial legislation affecting or of interest to the Board.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
L12	Contracts and Agreements - Contract Performance Records related to compliance or performance of contracts. Includes determination of costs, performance of services and payments. Contracts Under Seal Simple Contracts	Originating	T	20	T+20			T = Termination year of contract/agreement
			T	6	T+6			
L13	Contracts / Agreements - Real Property Improvements Records related to contracts and agreements for improvements to real property.	Plant	T + 1	19	T + 20			106, 107, 108, 109, 110, 111, 117, 118, 119, 121 T = Termination of the contract.
L14	Copyright / Trademark / Patents Records related to preparation, filing, maintenance and rights (example: Copyright (Compliance))	Originating	T	6	T + 6			11, 12, 13, 163, 174 T = end of Intellectual Property Coverage

HSCDSB - RETENTION SCHEDULE

LEGAL

Includes records regarding legal matters as well as contracts and agreements, insurance and real estate matters. Also includes Federal and Provincial legislation affecting or of interest to the Board.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
L15	<p>Hearings / Proceedings Includes all correspondence and related documentation regarding hearings and legal proceedings. Includes copies of notices, judgements, orders, and decisions regarding HSCDSB.</p> <p>Excludes: > Original Orders & Judgements - see L09 Compliance - Orders - Agency/Court</p>	Administration	T + 1	19	T + 20		YES	113
L16	<p>Insurance Includes records regarding the Board's insurance liabilities such as agents and adjusters' premiums, policies, certificates and appraisals. (example: Ontario School Boards' Insurance Exchange (O.S.B.I.E.)</p> <p>Excludes: > Insurance Claims - see L06 Claims/Litigation. > Accident Reports - see L01.</p>	Business	T + 1	5	T + 6 Perhaps change this to permanent		YES	104, 105, 114, 120 T = expiry of policy. See L01 for citation.
L17	<p>Insurance - Future Liability Record related to insurance coverage for future liability, exposure to hazardous substances, or other problems manifesting themselves long after the policy terminates. Includes liability policies.</p>	Business	T + 2		T + 2			104, 105 T = Termination of the agency.

HSCDSB - RETENTION SCHEDULE

LEGAL

Includes records regarding legal matters as well as contracts and agreements, insurance and real estate matters. Also includes Federal and Provincial legislation affecting or of interest to the Board.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
L18	<p>Leases / Mortgages Includes leases of property and land to and by the Board</p>	Business	T	10	T + 10			90, 108, 109, 111
L19	<p>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.</p> <p>Excludes: > Building Permits - see B02 Building Approvals. > Original agreements and contracts - see L10 Contracts and Agreement - Simple and L11 Contracts and Agreements - Under Seal.</p>	Plant	C + 1	-	-			
L20	<p>Police Matters Includes correspondence between schools and police departments regarding extra duty officers, police visits to schools, and related items.</p> <p>Excludes: > Security - see B02 Building Approvals. > Safety Awareness - see E08 Safety and Health Awareness Programs.</p>	Originating	C + 1	-	2			

HSCDSB - RETENTION SCHEDULE

LEGAL

Includes records regarding legal matters as well as contracts and agreements, insurance and real estate matters. Also includes Federal and Provincial legislation affecting or of interest to the Board.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
L21	<p>Precedents Includes copies of documents from previous files to be used as examples for subsequent files and will include standard forms of documents for use by the Board.</p>	Originating	S		S		YES	
L22	<p>Property Damage Includes reports and general correspondence regarding property damage, theft or loss. Also includes vandalism, copies of repair invoices, monthly and annual summaries.</p>	Originating	C + 1	3	5			
L23	<p>Property Matters Includes legal documents (deeds, 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. (example: Transfer of Property)</p> <p>Excludes: > Capital Revenue - see F09. > Property Appraisals</p>	<p>Business</p> <p>Business</p>	<p>T + 1</p> <p>S</p>	19	T + 20			<p>106 to 121, 179</p> <p>T = disposal of property.</p>

HSCDSB - RETENTION SCHEDULE

MANAGEMENT/POLICY

Includes records regarding the establishment of policy and by-laws and the activities of the Board of Trustees. Also includes elections.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
M00	Management / Policy - General Includes Management/Policy records which cannot be classified elsewhere. Use only if no other heading is available.	Originating	C + 1	-	2			
M01	Administrative Council(s) Includes agenda and minutes of the Administrative Council of the Board of Education. Excludes: > Staff Meetings - see A21 Staff Meetings/Committees. > Trustee Committees - see M20.	Director of Education	C + 1	P	P			15, 16, 17, 26, 27, 101 Keep shorthand notes for 2 years .
M02	Appointments to Boards and Committees Includes records on recommendations made by the Board regarding appointments to other local Boards such as the Library Board. (example: Student Trustee on Board)	Board Secretary	T + 1	-	T + 1	YES		26, 85, 88, 128 T = expiry of term of office.

**HSCDSB - RETENTION SCHEDULE
MANAGEMENT/POLICY**

Includes records regarding the establishment of policy and by-laws and the activities of the Board of Trustees. Also includes elections.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
M03	Board Agenda Includes agenda of meetings of the Board of Trustees as well as working notes used in agenda preparation.	Board Secretary	C + 1	P	P		YES	15, 26, 27 Keep shorthand notes for 2 years.
M04	Board Minutes Includes originals and copies of minutes of the proceedings of meetings of the Board of Trustees. Excludes: Board Reports - see M05.	Board Secretary	C + 1	P	P		YES	15, 16, 17, 26, 27, 101 Keep shorthand notes for 2 years .
M05	Board Reports Includes staff reports and any other official copies of reports to the Board of Trustees concerning any issue that affects the management, planning and implementation of programs and operations of the schools and departments. (example: Annual Reports) Note: The official copy of the Board report is filed with the agenda in the office of the Board Secretary.	Board Secretary	C + 1	P	P			15, 16, 17, 26, 27, 101 Keep shorthand notes for 2 years.

HSCDSB - RETENTION SCHEDULE MANAGEMENT/POLICY

Includes records regarding the establishment of policy and by-laws and the activities of the Board of Trustees. Also includes elections.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
M06	<p>By-Laws Includes final versions of the Board's by-laws, amendments, and special resolutions, and attachments that are legally part of the by-laws. Also includes incorporation documentation.</p> <p>Excludes: > Background information - file by subject.</p>	Board Secretary	S	P	P			16, 17, 26, 27
M07	<p>Correspondence - Executive Records related to correspondence generated by the Chairperson, Members of the Board, Director of Education and Superintendents. (examples: Letters of Congratulations - Awards, Letters to Parents)</p>	Originator	C + 1	8	10			
M08	<p>Education Guidelines Includes guidelines provided by the Ministry of Education. Records include memoranda, directives and correspondence. Also includes guidelines on Ministry ordered school closings.</p> <p>Excludes: > Policies/Procedures/Guidelines - see M17. > Curriculum Guidelines - see C01.</p>	Director of Education	S	-	S			

HSCDSB - RETENTION SCHEDULE MANAGEMENT/POLICY

Includes records regarding the establishment of policy and by-laws and the activities of the Board of Trustees. Also includes elections.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
M09	Elections Includes records on federal, provincial and municipal elections and the Board's involvement.	Director of Education	T + 1	-	T + 1			126, 127 T = expiry of term of office.
M10	Legislation - Federal Includes records regarding bills, acts and regulations enacted by the Parliament of Canada which affect or are of interest to HSCDSB.	Originator	S		S			None
M11	Legislation - Provincial Includes records regarding bills, acts and regulations enacted by the Ontario Legislature which affect or are of interest to HSCDSB. (examples: Governance, Governance & Finance Reform in Education)	Originator	S		S			None

HSCDSB - RETENTION SCHEDULE MANAGEMENT/POLICY

Includes records regarding the establishment of policy and by-laws and the activities of the Board of Trustees. Also includes elections.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
M12	<p>Ministries / Agencies - Federal Includes records regarding the activities of Federal Ministries, Agencies, and Crown Corporations as they pertain to or are of interest to HSCDSB. (examples: Government of Canada, MPP Federal)</p> <p>Excludes: > Federal Legislation - see M10 Legislation - Federal.</p>	Originator	C + 1	1	3			None
M13	<p>Ministries / Agencies - Provincial Includes records regarding the activities of Ontario Provincial Ministries, Commissions, Agencies, and Crown Corporations as they pertain to or are of interest to HSCDSB. (examples: Education Improvement Commission, Ministry of Education, Robin's Report)</p>	Originator	C + 1	1	3			None
M14	<p>Municipalities - Area Includes records regarding area municipalities within HSCDSB's jurisdiction. (example: City of Sault Ste. Marie)</p>	Originator	C + 1	1	3			None

HSCDSB - RETENTION SCHEDULE MANAGEMENT/POLICY

Includes records regarding the establishment of policy and by-laws and the activities of the Board of Trustees. Also includes elections.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
M15	Municipalities - Other Includes records regarding municipalities outside of HSCDSB jurisdiction.	Originator	C + 1	1	3			None
M16	Organization Includes records regarding reporting relationships, organizational analysis, Board Vision, Mission and Values etc. Also includes organizational charts.	Board Secretary	S	-	S		YES	26
M17	Policies / Procedures / Guidelines Includes policy and procedure manuals, guidelines and directives, and all other policies and procedures established by the Board, departments and schools. (examples: accounting procedures, emergency procedures, evaluations handbooks, personnel, and attendance reporting procedures, child abuse - protocol to report) Working Papers & Drafts: Excludes: > Curriculum Guidelines - see C01. > Education Guidelines - see M08.	Board Secretary - c/o Human Resources	S T + 1	P	P		YES	26, 78 T = Approval of Policies/Procedures/Guidelines
M18	Strategic Planning							

HSCDSB - RETENTION SCHEDULE MANAGEMENT/POLICY

Includes records regarding the establishment of policy and by-laws and the activities of the Board of Trustees. Also includes elections.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
	Includes but is not limited to information for the strategic planning of internal goals and objectives of the Agency, its departments, programs and services. (examples: project plans and charters, restructuring, etc...)	Originating	T	T				
M19	<p>Trustees Includes correspondence with external agencies and news items regarding the trustees. Also includes trustee distribution, orientation information, and commendations and complaints from the public. (examples: inaugural address - Board Chairperson, Oath of Allegiance)</p> <p>Excludes: > Trustees Register - see M21.</p>	Board Secretary	T + 2	-	T + 2	YES	15, 16, 17, 26, 27, 85, 88, 101, 128	T = expiry of term of office. Keep shorthand notes for two years .
M20	<p>Trustee Committees Includes agenda and minutes of all Board committees involving staff and trustees, such as steering, standing and advisory committees, task forces, the Employee Assistance Program Advisory Committee and Special Education Advisory Committee. Includes adhoc committees.</p> <p>Excludes: > Staff Meetings and Committees - see A21.</p>	Board Secretary	C + 1	P	P		15, 16, 17, 26, 27, 101	Keep shorthand notes for two years.

HSCDSB - RETENTION SCHEDULE MANAGEMENT/POLICY

Includes records regarding the establishment of policy and by-laws and the activities of the Board of Trustees. Also includes elections.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
M21	<p>Trustees Register Includes a register of the names, addresses and callings of all persons who are or have been trustees of the Board with the several dates on which each became or ceased to be a trustee.</p>	Board Secretary	P	-	P	YES		<p>15, 16, 17, 26, 27, 85, 88, 101, 128</p> <p>Keep shorthand notes for two years.</p>

**HSCDSB - RETENTION SCHEDULE
PUBLIC RELATIONS/COMMUNICATIONS**

Includes records regarding the Board's relations with the public as well as records relating to the production and distribution of information to the public, outside agencies and schools.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
P00	Public Relations / Communications - General Includes records regarding communications/public relations which cannot be classified elsewhere. Use this heading only if no other subject heading is available. (examples: Marketing, Youth New Network)	Originating	C + 1	-	2			
P01	Advertising Includes correspondence, copies of advertisements (examples: Junior and Senior Kindergarten registration, ad books and price lists) Excludes: > Recruitment – see H20 Recruitment/Selection.	Originating	C + 1	-	2			
P02	Complaints and Commendations Includes complaints and commendations received from the general public and parents regarding various programs and the treatment of students. Also includes certificates or appreciation and petitions. (example: School Complaints and Commendations) These records are considered Executive Correspondence. Excludes: > Complaints/commendations directed to Trustees - see M19 Trustees.	Originating	C + 1	8	10	YES		85, 88, 128

**HSCDSB - RETENTION SCHEDULE
PUBLIC RELATIONS/COMMUNICATIONS**

Includes records regarding the Board's relations with the public as well as records relating to the production and distribution of information to the public, outside agencies and schools.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
P03	Contact / Mailing Lists Includes all lists of individuals or organizations to whom Board communications are sent for information purposes. Also includes principal's visitors book, parental emergency contact lists, student lists, etc.	Originating	S	-	S	YES		29, 128
P04	Events Includes memos, correspondence with parents and others, programs and all related materials pertinent to events sponsored by the Board or by schools. Includes parents' nights, 25 years & retirement dinners, Remembrance Day activities, and commencements. This includes student recruitment events, graduations, Christmas concerts and openings. (examples: Faith Development Day, Jubilee, Highlights) Excludes: > Educational Contests/Events - see C07 Field Trips/Education Outside the Classroom. > Education Week - see E02 Community Education/Liaison. > Career Days - see E01 Careers Information. > Fund Raising Events - see A10 Fundraising.	Originating	C + 1	2	4			26
P05	Media Relations / News Releases Includes records regarding Board relations with the various media. (examples: press releases and information releases)	Originating	C + 1	2	4			26

**HSCDSB - RETENTION SCHEDULE
PUBLIC RELATIONS/COMMUNICATIONS**

Includes records regarding the Board's relations with the public as well as records relating to the production and distribution of information to the public, outside agencies and schools.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
P06	Memorabilia Includes records regarding school memorabilia, collectibles and other historical items which reflect the individual nature of the schools. (examples: informal school histories, school logos and crests, songs, etc...)	Administration/ School	C + 1	P	P			26
P07	News Clippings Includes clippings of news items from newspapers, magazines and other publications in Canada and worldwide regarding the Board, staff, students and trustees.	Originating	C + 1	-	2			26
P08	Photographs Includes class photos, yearbook photos, officials/trustees group photos and slides. Excludes: > Photos of building construction and/or damages, see B03 Building Improvements	Administration/ School	C + 1	P	P			26

**HSCDSB - RETENTION SCHEDULE
PUBLIC RELATIONS/COMMUNICATIONS**

Includes records regarding the Board's relations with the public as well as records relating to the production and distribution of information to the public, outside agencies and schools.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
P09	Promotions Includes but is not limited to records regarding the promotion of the Board. Includes records regarding the promotion of Board etc.	Originating	C + 1	1	3			
P10	Publications Includes records and artwork regarding publications currently being produced by the Board such as yearbooks, curriculum handbooks for parents, school handbooks for teachers, school calendars, annual reports, brochures on programs offered by schools, newsletters, and other school promotions. (example: Education Law) Excludes: > Publications received from external sources.	Originating	C + 1	P	P			26
P11	Speeches / Presentations Includes background notes, draft, master copies and duplicates of speeches prepared for delivery by Board staff and elected officials.	Originating	C + 1	2	4			

HSCDSB - RETENTION SCHEDULE

RESEARCH/PLANNING

Includes records regarding strategic/program planning and research, as well as enrolments and Ministry Reports

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
R00	<p>Research / Planning - General Includes general research/planning records which cannot be classified elsewhere. Use only if no other subject heading is available. (examples: School Facilities, School Organization, Year Round Schools etc...)</p>	Administration	C + 1	-	2			
R01	<p>Community / Parent Research Includes surveys and research conducted on parents and the general community regarding issues affecting the school system.</p>	Administration	T + 1	5	T + 6			T = completion of research project.
R02	<p>Curriculum / Program Research Includes records of any research conducted into curriculum or program development, such as questionnaires, interest surveys and independent research studies. (examples: Sandbox School, Kindergarten)</p> <p>Excludes: > Curriculum Planning - see C02.</p>	Administration	T + 1	5	T + 6			T = completion of research project.

HSCDSB - RETENTION SCHEDULE

RESEARCH/PLANNING

Includes records regarding strategic/program planning and research, as well as enrolments and Ministry Reports

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
R03	Enrolment Includes all counts and projections documenting enrolments in the school system. (example: Enrolment Reports)	Administration	C + 1	8	10 **			
R04	External Research Includes applications to conduct research from external sources such as universities, graduate students, foundations, and their final reports.	Administration	T + 1	5	T + 6			T = completion of research project.
R05	Ministry Reports Includes statistical reports, September school reports, June Board reports or other reports required by or sent to the Ministry of Education as part of the funding process or for the preparation of educational statistics.	Administration	C + 1	8	10 **			

HSCDSB - RETENTION SCHEDULE

RESEARCH/PLANNING

Includes records regarding strategic/program planning and research, as well as enrolments and Ministry Reports

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
R06	<p>Municipal Planning / Development Includes records regarding planning and development issues within the Municipality that may have implications on enrolments within the school system. Also includes general information and documentation regarding other municipal planning and development issues such as sewage and waste management, property acreages, etc. Includes subdivision plans, official plan amendments, zoning changes, Ontario Population Reports and traffic studies.</p> <p>Excludes: > Contracts and agreements - Under Seal - see L11.</p>	Administration	C + 1	3	5			
R07	<p>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.</p> <p>Excludes: > Accommodations Planning - see B01. > Transportation - see F30. > Policies/Procedures/Guidelines - see M17.</p>	Administration	S	P	P			26
R08	<p>Staff Research Includes surveys and research conducted on Board staff regarding issues and planning that affect them.</p> <p>Excludes: > Staff Allocation/Staff Lists - see H24.</p>	Administration	T + 1	5	T + 6			T = completion of research project.

HSCDSB - RETENTION SCHEDULE

RESEARCH/PLANNING

Includes records regarding strategic/program planning and research, as well as enrolments and Ministry Reports

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
R09	<p>Strategic Planning Includes all strategic and operational planning documents, mandates, as well as related correspondence, background and reference information. (examples: Viability of Schools, Vision for the future)</p>	Administration	S + 2	-	S + 2			
R10	<p>Student Demographics Includes aggregate reports profiling the characteristics of the student population, such as age, grade, promotion, country of birth, religion, and other trend data.</p>	Administration	C + 1	3	5			
R11	<p>Student Evaluation Research Includes system-wide trend data on the student evaluation and scoring system used to measure accountability in meeting program objectives.</p> <p>Excludes: > Individual Student Evaluation - see S02 Ontario Student Records - Current.</p>	Administration	T + 1	5	T + 6			T = completion of research project.

HSCDSB - RETENTION SCHEDULE

RESEARCH/PLANNING

Includes records regarding strategic/program planning and research, as well as enrolments and Ministry Reports

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
R12	<p>Students Research Includes surveys and research conducted on students such as secondary school selection, student background, age appropriate placement and career selections.</p>	Administration	T + 1	5	T + 6			T = completion of research project.

Legend: C (Current Year); P (Permanent); PIB (Personal Information Bank); S (Superseded); E (Event Required before Calculating Retention); T (Termination); **Subject to Archival Selection

HSCDSB - RETENTION SCHEDULE STUDENT RECORDS

Includes records regarding the delivery of services to individual students as well as records required under the Ontario Student Records Guidelines, including the OSR, documentation file, office index card and other information pertaining to an individual student.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
S00	Student Records - General Includes records regarding specific students which cannot be classified elsewhere. Use only if no other heading is available.	Originating	C + 1	-	2			
S01	Attendance Counselling Records	Student Services	1	-	1	YES		85, 88, 128
S02	Attendance Registers Includes registers and reports concerning the attendance of students, recording absences and late arrivals. Includes attendance collection sheets. Also includes class registers for non-school system programs such as continuing education and heritage programs.	School	C + 4	P	P	YES		2, 26, 85, 88, 128

HSCDSB - RETENTION SCHEDULE

STUDENT RECORDS

Includes records regarding the delivery of services to individual students as well as records required under the Ontario Student Records Guidelines, including the OSR, documentation file, office index card and other information pertaining to an individual student.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
S06	Co-operative Education Student Records	Co-operative Education	1	-	1	YES		28, 30, 32, 85, 88, 122, 128 After most recent course; subject to inclusion in OSR (S09).
S07	Exchange Programs Example: Students' Exchange - Foreign Students	School	1	-	1	YES		28, 30, 32, 85, 88, 122, 128 After exchange; subject to inclusion in OSR (S09).
S08	Immigrant Student Assessments	School	1	-	1	YES		28, 30, 32, 85, 88, 122, 128 Subject to inclusion in OSR (S09).

HSCDSB - RETENTION SCHEDULE STUDENT RECORDS

Includes records regarding the delivery of services to individual students as well as records required under the Ontario Student Records Guidelines, including the OSR, documentation file, office index card and other information pertaining to an individual student.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
S09	<p>Ontario Student Records (OSR) The Ontario Student Record (OSR) is the record of a student's educational progress through schools in Ontario. Includes:</p> <ul style="list-style-type: none"> >> Ontario Student Record Folder >> Ontario Student Transcript >> report cards >> the documentation file, where applicable (see below) <p>When a documentation file is required, it will be kept in the OSR folder. A documentation file will be established when the following information is required:</p> <ul style="list-style-type: none"> > verification of a custody order > verification of a change of surname (see section 10) > a written request to be named by repute (see section 10.1) > a statement of decision on Identification, Placement, and Review Committee (IPRC); the recommendation of an appeal board and the decision of the school board regarding identification and/or placement, where applicable; and a tribunal's decision regarding identification and/or placement, where applicable > an Individual Education Plan (IEP) for a student receiving special education programs and services > educational, psychological, and health assessments > an Intensive Support Amount (ISA) status form > the report of a Supervised Alternative Learning for Excused Pupils (SALEP) committee > letters of request for a correction to, or a deletion from, the record where the request has not been granted (see section 9) >>additional information that is identified by the school board as appropriate for retention >>> Student Record of Accumulated Instruction in French-As-A-Second Language >>> Sacramental Record Card >>> Personal Information <p>Note: Refer to HSCDSB Policy 8007 for further details NOTE: The OSR file is forwarded to the receiving school when the student transfers and must remain within Ontario. All records relevant to the improvement of the instruction of the student are subject to inclusion in the OSR Documentation File Excludes: > Student Master Records (SMRF)/Office Index Cards - see S08.</p>	School					YES	<p>28, 30, 32, 85, 88, 122, 123, 128, 166</p> <p>T = retirement/transfer of students*; computer database record purged on retirement/transfer;</p>
			T	55	T + 55			
			T	55	T + 55			
			T	5	T + 5			
			T	5	T + 5			
			T	5	T + 5			
			T	5	T + 5			
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			T	5	T + 5			
			T	5	T + 5			
			1					

HSCDSB - RETENTION SCHEDULE STUDENT RECORDS

Includes records regarding the delivery of services to individual students as well as records required under the Ontario Student Records Guidelines, including the OSR, documentation file, office index card and other information pertaining to an individual student.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
S10	<p>Special Education Student Files</p> <p>The Special Education Department Student File will contain any or all of the following materials:</p> <p>Includes:</p> <ul style="list-style-type: none"> > student referral forms, test materials, notes, and assessment reports that results from either first party Psychological, Educational or Speech-Language Assessment > third party reports that are released to the Special Education Department > I.P.R.C. referrals, minutes, and notes > In-School Education Team meeting minutes > correspondence regarding student needs > synopses of case-conferences/telephone discussions regarding student needs > release of Information form <p>Note: The OSR's Documentation File contains any or all parts of the Special Education Department Student File</p> <p>Note: Refer to HSCDSB Policy 8007 for details on record content</p>	Special Education Department	T	5	T + 5	YES		<p>28, 30, 32, 85, 88, 122, 123, 125, 128, 166</p> <p>T = retirement/transfer of students</p>

HSCDSB - RETENTION SCHEDULE

STUDENT RECORDS

Includes records regarding the delivery of services to individual students as well as records required under the Ontario Student Records Guidelines, including the OSR, documentation file, office index card and other information pertaining to an individual student.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
S11	Students' Marks Register Includes information on students' courses completed and marks received.	School	C + 4	P	P	YES		2, 26, 30, 32, 85, 88, 128
S12	Student Master Records (SMRF) / Office Index Cards Includes all student master records and office index or permanent record cards retained concerning individual pupils.	School	T + 55	-	T + 55	YES		28, 30, 32, 85, 88, 122, 128 T = retirement / transfer of pupil. Record remains with school after T.
S13	Student Report Listings / Student Lists Includes all report listings concerning students that are retrievable by student name or other identifier such as first language reports, New Canadian Student Reports, non-resident student reports, class list reports, Ontario scholar lists, tape dumps, office index listings, Student On-line Transaction Listings, and Student Information System edits. Includes other student lists such as home instruction, gifted, registration. (example: Class Size Reporting) Excludes: > Summary reports not organized by name - see R10 Student Demographics.	School	S + 1	-	S + 1	YES		28, 30, 32, 85, 88, 128

HSCDSB - RETENTION SCHEDULE STUDENT RECORDS

Includes records regarding the delivery of services to individual students as well as records required under the Ontario Student Records Guidelines, including the OSR, documentation file, office index card and other information pertaining to an individual student.

Class Code	Retention Category Description / Scope Notes and Cross Reference	Responsible Department	Retention of Official Record		Total Retention	PIB	Vital	Remarks/Citations
			within department	in storage				
S14	<p>Transfers / Admittances / Suspensions</p> <p>Includes reports and forms recording the transfer, exemptions, exit, room changes, suspensions, expulsions, out-of-zone, promotions or admittance of students to and from schools. (example: Religion Courses (Exemption))</p> <p>Excludes: > Registers of transferred OSR's - see A19 Records Disposition.</p>	Originator	C + 1	-	2	YES		28, 30, 32, 85, 88, 122, 128
S15	Vocational Assessment	School	1	-	1	YES		28, 30, 32, 85, 88, 122, 128 After most recent counselling; subject to inclusion