



Limestone District School Board

Records & Information Management Manual

Records Retention Schedule

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Purpose

Limestone District School Board is committed to implementing and maintaining a comprehensive Records and Information Management (RIM) program for the systematic creation of records and information that is accurate, authentic, reliable, and trustworthy; that supports access and accountability; and, that serves as evidence of Board activities. Accordingly, records and information shall be securely maintained for as long as required, as stipulated in the approved Retention and Disposition Schedule, and staff shall be trained on their responsibilities with regard to Board records and information.

The creation and management of Board records and information shall be in accordance with the provisions of the *Education Act*, the *Municipal Freedom of Information and Protection of Privacy Act* (MFIPPA), the *Personal Health Information and Protection Act* (PHIPA) and other relevant statutes and regulations of the Province of Ontario and the Government of Canada.

Scope

The Records & Information Management (RIM) Manual applies to all records within the custody or control of Limestone District School Board, and includes all records related to Board operations regardless of the medium in which those records were collected, stored and maintained.

All records and information created, received and maintained in the day-today business operations of the Board, including individual departments and schools, support the operations of the Board and as such are the property of the Board and subject to the Records and Information Management procedures outlined herein. This includes all business applications and information technology systems used to create, store and manage records and information including email, database applications and websites.

Records & Information Management is the responsibility of all Board employees as well as third party contractors or agents who collect or receive records and information on behalf of the Board.

Procedures

Identifying Information Requiring Capture

Records identified will be essential to ongoing legal requirements and effective functioning of the Board and will fall into the following categories:

ADM	Administration	The function of overseeing the administration of the team and units within the board and schools. Records supporting this function relate to administrative committees' decisions and meetings, and internal administrative supports or services, including acquiring and managing equipment, supplies, services and materials for schools.
COM	Communications & Public Relations	The function of promoting and marketing the board and/or schools, programs and services. Records in this function include board/school communication and press releases, speeches, websites, public relations activities, events and news releases as well as materials relating to marketing research, publications and reports.

FAC	Facilities Management	Includes managing and maintaining board buildings/facilities and supporting capital initiatives and building improvements. Records include maintenance and operations reports, requests and logs, environmental testing of facilities, equipment maintenance and testing, facilities planning and improvements, capital and non-capital projects, inspection reports, and records relating to property acquisition and disposition, building and office renovations, security, and property management relationships.
FIN	Business & Financial Services	The function of managing board/school financial and accounting resources. Includes establishing and operating and maintaining accounting (payables, receivables, revenue) systems, controls and procedures, financial planning, reporting, preparing budgets and budget submissions, and the monitoring and analysis of capital assets. Records include but are not limited to accounts payable and receivable, budgets, audits, benefits accounting, expense payments, financial reporting, fixed asset management and all matters regarding the allocation and control of funds.
GOV	Governance & Policy	The function of governing the board and its schools, exercising legal authority and control. The corporate governance structure specifies the distribution of rights and responsibilities among different participants in the board/schools, such as the board and staff, and articulates the rules and procedures for making decisions on its affairs. Includes resolutions, bylaws, policies and procedures, charters, board meeting administration, and strategic planning.
HUM	Human Resources	The function of managing/supporting all employee services within the organization in accordance with policies and procedures. Records include but are not limited to personnel records, employee collective agreements, employee information (including medical information), conditions of work, health and safety, overtime, salary rates, pensions, benefits, payroll records, grievances, performance evaluations and recruitment.
ICT	Information & Communications Technology	The function of applying and managing information and communications technology to support the instruction, administration and operational needs of the organization to capture, store, retrieve, transfer, communicate and disseminate information through automated systems such as Wide Area Networks and Local Area Networks. Includes planning, determining requirements, developing, acquiring, modifying and evaluating applications and databases, and acquiring, tendering, leasing, licensing, registering and disposition of systems.
LEG	Legal Matters	The function of addressing legal issues relating to the operations of the board and schools. Records include, but are not limited to, claims and litigation files, appeals and hearings, contracts and agreements entered into on behalf of the board and schools, deeds and titles relating to properties and harassments incidents.
PDD	Program Development & Design	The function of applying curriculum guidelines and designing education programs for students. Records include but are not limited to proposals, correspondence, lesson plans, and course outlines.
RPL	Research & Planning	The function of researching and planning to support the ongoing operations of the school and board. Records include but are not limited to research surveys, studies and reports which address issues such as school boundaries, student demographics, municipal planning and statistics used to support Ministry funding requests.
STU	Student Services	The function of providing students with programs and services in accordance with the Education Act. Records cover such areas as admissions, transfers and withdrawals, Ontario Student Records, guidance and counseling assessments, consent/permission forms for special activities and programs, and extra-curriculum programs and participation.

Records Centres and Locations

School principals and managers/supervisors will be responsible for the effective management of records created and/or used in their school or department.

Records will be labeled and organized for efficient retrieval and destruction with the LDSB Records Retention Form.

Retention Schedule

The Records Retention Schedule is the official schedule for Limestone District School Board. It will outline retention of the Board's records according to their administrative, fiscal, legal, and research/archival value. It will include records that must be retained according to legislation and/or Board procedures and a notation of the archival/historic importance of each record series (at the secondary level), where appropriate.

All recorded information will be identified in the retention schedule and will not be destroyed or removed from the control or custody of the Board except as authorized in the schedule.

Additional records not listed on the Records Retention Schedule will be stored at the discretion of the principal or department manager/supervisor. Many items received for reference purposes are not school records such as booklets, information from other educational institutions or associations.

The schedule will exclude all reference, resource, and library material such as books, articles, and external publications which are not official records of the Board.

Users will be responsible for purging, storing, and transferring inactive records according to the procedure as laid out in the Records Management Manual.

Shredding/recycling paper records will be the physical and financial responsibility of each individual site/school.

In order to maintain the Board's retention schedule, the following will occur:

- Establish a regular schedule for disposal of records, normally once a year;
- Review the retention schedule on a regular basis and update as required;
- Train staff in records retention procedures.

Retention Process

For access and privacy purposes, there will be only one complete official copy of each record retained.

Back-up copies will be prepared only when there is sufficient need for authenticity of the original record, when they are considered vital records and to provide ease of access.

Electronic material will be backed up in accordance with the schedule developed by Information Technology Services.

At the time of storage, a label indicating the primary and secondary levels as well as the disposal date and/or retention date will be affixed to the box before it is stored to facilitate destruction per the retention schedule. (Use LDSB Records Retention Form)

Confidential/Personal Information Records

Confidential records and those containing personal information will be treated as such for purposes of storing, maintaining, transferring, or destruction. They will be destroyed in such a manner that they cannot be read, interpreted, or reconstructed according to the terms of the Municipal Freedom of Information and Protection Privacy Act.

Storage

The development of a records storage plan will include the short and long-term housing of inactive physical records and electronic information.

The Records Management Coordinator will maintain Board records that are not frequently needed but must be retained for a number of years.

Active records are to be maintained at the site they originated in and shall be governed by the retention schedule. Records will be labeled and organized for efficient retrieval and destruction. The storage area at each site must meet the security and environmental needs to store documents.

Special consideration will be given to archival information and records on the history of the Board. Archival records will be handled with care, and appropriate protective measures will be taken to reduce wear and tear on the records.

Disposition for Paper, Electronic, and Film Records

In general, the school or department that created or authorized creation of a record will be responsible for its retention and disposal, including records stored on a computer.

Records will be reviewed regularly for disposal, including electronic and other viable media records, and in accordance with the Board's Retention Schedule. This includes all relative back-up tapes and hard drives.

Duplicate records and temporary working papers such as, but not limited to, rough notes or informal drafts will be destroyed at the time the official records are destroyed as they should not outlive the documents that resulted from them.

Records which include confidential/personal information or are of a sensitive nature will be destroyed by shredding using an approved cross-cut shredding vendor to ensure the information being destroyed is illegible.

To avoid overloading the storage capacity on the server, Information Technology Services will eliminate records after advising the user and allowing a reasonable time for them to destroy the record or make other arrangements for storage.

Most electronic/voice mail and telephone transitory messages will be considered short-term records and will be disposed of as soon as their purpose has been served. However, if the content of the message or any attachments are considered business records, they fall under the approved Classification Scheme and Records Retention Schedule.

The following will be the process for destroying Board/school records:

- Staff will refer to the approved retention schedule for timelines;
- A record of the destruction will be made and a copy sent to the Records Management Coordinator;
- A Certificate of Destruction is required from the vendor performing the destruction. Destruction records will be retained permanently in accordance with the Retention Schedule;
- The retention schedule will be amended and approved to dispose of a record not listed.

In the event of a school closure/consolidation, the principal will work with the Freedom of Information Coordinator to complete residual record keeping requirements for student, administrative, and archival records.

If there is a potential lawsuit; investigation or pending audit, related documents will not be destroyed.

Records Confidentiality

Practices will be in place to protect confidential, sensitive, and personal records and information from unauthorized collection, use, disclosure, or destruction in accordance with the provisions of the Education Act, the Municipal Freedom of Information and Protection of Privacy Act (MFIPPA), the Personal Health and Information Protection Act (PHIPA), the confidentiality requirements of the Ontario Student Record Guideline, the School Board privacy policy and regulations of the Province of Ontario and the Government of Ontario.

Shredding locked bins will be provided for the disposal of personal and confidential information.

Confidential records and those containing personal information will be treated as such for purposes of storing, maintaining, transferring, or destruction. They will be destroyed in such a manner that they cannot be read, interpreted, or reconstructed according to the terms of the Municipal Freedom of Information and Protection of Privacy Act.

Records Security

All records will be managed to meet rules of evidence and legal discovery. Control arrangements will include provisions for the protection and appropriate use of Records and Information Management to mitigate risks.

Records and Information Management will be managed to support business continuity and recovery in the event of a disaster.

Accessibility

Access to records internally and outside of the Board will be given priority, while balancing the requirements of business confidentiality, data privacy, and public access.

Information to support evidence of Communications pertaining to FOI actions and decisions will be routinely recorded and stored.

Information will be accessible to staff who require it in the performance of their duties and are authorized to access it.

Information will be shared across the organization and with social agencies in accordance with operational needs and statutory provisions.

Plans and practices to actively make records available to the public will be in place, and records will be available to the public by request, subject to statutory requirements.

The procedure for managing official requests is available in the Board Policy and Procedures in accordance with the Municipal Freedom of Information and Protection of Privacy Act.

Management of Electronic Records

Objectives

Electronic records are increasing as a percentage of Limestone District School Board total records volume. Since they exist in a micro-format and a machine is needed to identify, retrieve and read them, managing electronic documents and electronic mail messages (referred to in this procedure as “electronic documents”) calls for requirements different from those that manage paper-based records.

Electronic documents received and created in the conduct of Limestone District School Board business are considered official records and, as such, may be accessed in response to MFIPPA, litigation, and operations. At the same time, electronic documents that are transitory must be destroyed immediately after their usefulness has expired.

Procedures

This procedure aims to ensure that Limestone District School Board's electronic document practices comply with industry standards and legislation, which include:

- Ensuring that electronic documents are verifiable as evidence (not altered); and,
- Destroying, with approvals, electronic documents when their use has expired in accordance with the Retention Schedule

Electronic records will be governed by the statutes that apply to the access, retention, and destruction of all public records. They will include but are not limited to:

- computer-generated records and computer database files
- records transferred (by scanning, fax, data input, imaging etc.) from paper or other hard copy files into a computer or document management system
- records on disk (hard disks, optical disks, etc.)
- other hard copy files into a computer or document management system
- records on magnetic tape
- audiotapes and videotapes
- e-mail and voicemail messages
- computerized calendar and time management systems
- facsimile documents received on a computer and stored electronically
- intranet and internet transmissions

To ensure that the information in electronic format is accessible, work sites/schools will record the following on the outside of the disk, tape, container etc.:

- Description of the data
- Name of the system on which the medium is to be used
- Name and version number of the application software
- Recording dates
- Security precautions and access restrictions
- Type of copy (storage, working, back-up, etc)
- Retention dates according to the retention schedule

The need to maintain electronic records will also be taken into consideration when upgrading software or hardware throughout the system. Electronic files, particularly those designated as permanent records, will be migrated onto the new technology and stored in a secure stable area.

Electronic material will be backed up in accordance with the schedule developed by Information Technology Services.

In general, the school/department that created or authorized creation of a record will be responsible for its retention and disposal, including records stored on a computer.

To avoid overloading the storage capacity on a server, Information Technology Services will eliminate records after advising the users and allowing a reasonable time for them to destroy the record or make other arrangements for storage.

Most electronic/voice mail and telephone transitory messages are considered short term records and will be disposed of as soon as their purpose has been served. However, if the content of the message or any attachments are considered business records, they will fall under the Retention Schedule and must be directed to their appropriate folder based on the Classification Scheme and Records Series they fall into.

Email

The electronic mail system is owned by the Limestone District School Board, and it is to be used for school business. Occasional use of the system for messages of a personal nature will be treated like any other message. Limestone District School Board desires to respect the right to privacy of its employees and does not monitor electronic mail messages as a routine matter. However, it reserves the right to access them, view their contents, and track traffic patterns. Furthermore, Limestone District School Board will inspect the contents of e-mail messages in the course of an investigation triggered by indications of impropriety or as necessary to locate substantive information that is not more readily available by other means.

When using e-mail, the message created or used may or may not be a record. When it is designated as a record, it is subject to the records retention policies of the School Board. Within the School Board, each person is responsible for controlling records according to the records management procedures, and when an e-mail message is considered a record, it falls into this category.

Before selecting e-mail as a means for communication or document transmission, users should consider the need for immediacy, formality, accountability, access, security, and permanence. E-mail differs from other forms of communication. It is immediate and informal, similar to a telephone conversation, yet it is more permanent. It is as irrevocable as a hard-copy document, yet easy to duplicate, alter, and distribute.

Limestone District School Board reserves the right to monitor employee use of e-mail by system administrators. Employees are reminded that e-mail use is provided primarily for business purposes and not for personal purposes and that employees cannot expect protection of their personal or business-related e-mail correspondence under privacy laws and regulations.

Archives

Objectives

The Records Management procedure has been designed to specifically address the establishment of a records management system and in addition, special consideration will also be given to those records identified in the schedule as having archival value. Although no longer required for daily purposes, these records contain information which is of value for both long-term use and for historical reference.

Procedures

Archival records will have administrative, fiscal, legal, evidential, and/or informational values that deem them to merit permanent retention. Archival records will be effectively stored once the original operational need for the record has ceased to ensure that valuable documents are not destroyed.

Care will be taken in handling and boxing archival records. Adequate descriptions must be made to permit ready access, and appropriate protective measure must be taken to reduce the wear and tear on records that do not have to be consulted often. Because of the special attention archival records require, they will be maintained by trained staff.

Archival retention schedules will be approved by the HR Manager & Freedom of Information Coordinator. The following list provides general information on the types of records which should be maintained as archival for historical reference:

- minutes of official meetings
- Board reports
- newspaper clippings/scrapbooks/photographs
- architectural plans/engineering drawings
- in-house publications/brochures/promotional material and
- legal documents

The Records Management Coordinator will be contacted regarding appropriate legal agreements to donate historical documents and artifacts to an approved archives, local museum or historical society.

Vital Records Protection

Objectives

The vital records protection procedures aim to identify those records which are important to Limestone District School Board and to evaluate the potential risks to the records. A school or department must develop and implement records-maintenance practices to protect the designated records from various potential risks.

Typical hazards include: natural disasters, fire, water, acid or humidity damage, theft, accidental error, misplacement or loss, and unauthorized access. These hazards cannot be totally eliminated but can be minimized with effective records management procedures.

Procedures

For each record series designated as vital and important, the cost and risk of losing the records is compared to the cost of safeguarding the records. Vital records include those that are:

- Irreplaceable whereby a reproduction does not have the same value as the original (such as a signed contract);
- Needed in order that money can be recovered promptly;
- Required to expedite the restoration of a critical service; and,
- Evidence of legal status, ownership, accounts receivable, land title, and/or obligations.

An important record is one that can be replaced, but only at considerable time, expense and labor and may include:

- Direct copying and dispersal to another location onsite or offsite
- Micro-imaging into film or digital format and dispersal to another location
- Storage in a fire-protected cabinet
- Duplication at alternative offices

The protection method which is the most efficient and cost-effective to maintain, considering staff costs and space, will be selected for each vital and important records series. The FOI Coordinator will provide advice and assistance with the analysis of protection methods for vital records.

Roles and Responsibilities for Records Management

The Director of Education and Supervisory Officers

Are assigned the highest level of responsibility for ensuring a successful records management program. This support is translated into the allocation of resources at a lower level. It promotes compliance with records management procedures throughout the organization.

The Director of Education and Supervisory Officers are responsible for establishing, implementing and maintaining a program that manages information optimally and best serves the interest of the School Board, Schools and Community.

Senior Human Resources Lead, Freedom of Information Coordinator, Records Management Coordinator and IT Department

Has primary responsibility for implementation and maintaining the records management program. In particular, they establish the overall records management policies, procedures and standards for the organization and implement the process. This includes security controls, designing and implementing systems using information and communication technologies. Specific responsibilities include:

- Overseeing the records and information management program

- Facilitating the development of filing systems and maintaining these to meet administrative, legal and financial requirements
- Establishing and maintaining documentation, including records inventories, storage information and disposition schedules
- Conducting periodic audits for compliance with policy and procedures
- Overseeing the management of records storage areas, ensuring that records are properly stored, evaluating records storage equipment and participating in negotiation of vendor contracts and agreements
- Continuing to incorporate all electronic records into the Records and Information Management program
- Ensuring that appropriate access and security rules are in place to protect both paper and electronic records as required.
- Reviewing and upgrading the Records & Information Management Program as necessary.

Principals, Supervisors and Managers

Are responsible for ensuring that their staff create and keep records as an integral part of their work and in accordance with established policies, procedures and standards. They provide the resources necessary for the management of records and liaise with HR Manager & Freedom of Information Coordinator and the IT Department on all aspects pertaining to records. Specific responsibilities include:

- Creating, receiving and managing Board records and information to provide details about and evidence of the activities of the Board.
- Managing all records and information regardless of format (paper, electronic, audio, videotapes and microfiche etc.) according to applicable Federal and Ontario laws and Board by-laws and procedures.
- Managing electronic records and information including email records in the Board.
- Maintaining records and information according to the department file plan developed from the Board classification scheme.
- Ensuring that appropriate access and security rules are in place to protect both paper and electronic records.
- Applying the records and information retention schedules and securely dispose of records in accordance with those schedules.
- Ensuring that all third-party organizations, contractors or agents who receive or collect personal information on behalf of the Board are aware of and comply with the records management program.

Staff

Create, receive and maintains records as part of their daily work, and should do so in accordance with the records management program policies, procedures and standards; this includes disposing of records only in accordance with the authorized retention schedule. Specific responsibilities include:

- Being responsible for all records and information regardless of format (paper, electronic, audio, videotapes, microfiche etc.) according to applicable Federal and Ontario laws and Board by-laws and procedures;
- Applying the records and information retention schedules and securely disposing of records in accordance with the retention schedule; and,
- Managing electronic records and information including email records in the Board.

Classification Index

Administration (White)

Associations/Organizations
Audio-Visual Services
Forms Inventory
Library Management
Meeting Documentation – Internal
Meeting Documentation – External
Policing Arrangements
Records Destruction Notices
Records Management Listings and Reports
Requests for Information
Service Requisitions and Reports
Vendors/Suppliers/Contractors

Communications and Public Relations (Blue)

Advertisements
Appreciation and Commendations
Communication
Complaints
Contacts and Mailing Lists
Events, Ceremonies and Celebrations
Media Relations, Communications and News Releases
Memorabilia
Multimedia Materials
News Reports
Publications: Internal
Speeches and Presentations
Websites

Facilities Management (Red)

Audio Visual Services

Building and Site Approvals

Confined Spaces

Designated Substance and Hazardous Material Monitoring: Hazardous, Biological, Chemical or Physical Agents

Designated Substance and Hazardous Materials: Waste Monitoring and Management

Drawings and Specifications

Emergency Plans

Facilities Construction Projects

Facilities Planning

Inspection and testing Logs and Reports

Inspection Logs and reports: Fire Protection Equipment and Emergency Power Systems

Land Surveys

Maintenance and Operations: Buildings, Physical Plant, Equipment

Maintenance and Operations: Grounds

Material Safety Data Sheets

Permits/Facility Bookings

Security

Vehicles/Fleet Management

Business and Financial (Green)

Accounts Payable Accounts

Articles of Incorporation, By-law and Constitution

Receivable Audits Financial

Banking and Cash Management

Budgets

Capital Projects Financing

Capital Revenue

Financial Forecasts and reports

Financial Statements

Financial Work Papers

Funding Assessments
Funding – External Sources
Funding – Student Council
Fundraising – Charitable Organizations
Income Tax Returns
Insurance Policies
Inventory Control: Fixed Assets
Inventory Control: Non-fixed Assets
Investments
Journal Vouchers and Journal Entries
Ledgers: General
Ledgers: Subsidiary and Journals
Payroll Management
Pension Contributions and Support
Pension Plans
Purchasing Documentation
Sales and Property Tax Returns and Reports
Transportation Reports and Costing

Governance and Policy (Gray)

Appointments: Board and Committee
Audits: Program
Guidelines, Policies and Directives: External
Guidelines, Policies and Directives: Internal
Intergovernmental Reporting and Communication
Meetings: Board of Directors
Meetings: Governance Committees and Councils
Organization Structure
Strategic Planning
Trustee Management

Human Resources (Yellow)

Attention: Employee

Criminal Background Checks and Declarations

Employee Benefit Plans

Employee Claims

Employee Incident/Accident Reports

Employee Records

Employee Surveys

Employment Equity Program

Health and Wellness

Health and Safety Committee

Human Resource Planning

Incident Reports: Health and Safety and Student Safety

Job Descriptions

Labour Relations

Labour Relations: Employee Relations

Labour Relations: Union Certification

Medical Records: Employee

Medical Records: Hazardous Materials Exposure

Pay Equity

Performance Appraisals

Professional Development Participation

Professional Development Programs and Materials

Recruitment and Hiring

Resumes and Job Applications

Salary Administration

Staff Awards, Certificates and Bursaries

Staff Listings and Directories

Temporary Resourcing

Training – Legislated

Training – Non-Legislated

Volunteers

Information and Communications Technology (Purple)

Access Control and Password Records
Computer System Design and Architecture
Information Systems Production Activity and Control Files
OnSIS Reporting
Telecommunications Systems

Legal Matters (Black)

Accident/Incident Claims and Reports
Acts and Legislation
Appeals and Hearings
Claims and Litigation
Contracts and Agreements
Deeds and Titles
Legal Opinions/Precedent
Property Acquisition and Sales
Property Damage/Trespassing Reports
Transportation Accidents

Program Development and Design (Orange)

Outlines/Courses of Study
Program Development and Design
Program Planning
Program/Curriculum Guidelines
Programs and Services: Community
Programs: Continuing Education
Programs: Drivers Education
Programs: Parks and Recreation

Research and Planning (Teal)

Planning: School Boundaries
Planning: School Enrolments
Reference Materials
Research Curriculum/Program Research
Research Data and Work Papers
Research Projects: Curriculum/Program
Research Projects: School System
Research Projects: Student Demographics
Research Requests

Student (Pink)

Annual Forms
Bursaries and Awards
Case Files: Attendance Issues
Case Files: Counseling
Case Files: Placement Assessments
Case Files: Referrals
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Examinations and Testing
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Guidance Materials
Homeschooling
Office Index
Ontario Student Records
Programs: Cooperative Education
Programs: Non-Classroom
Registers: Student Enrolment and Attendance
Registers: Student Marks
Student Exchanges
Student Health Records
Student Meal Programs
Student Records: Continuing Education

Student Records: Co-op Programs
Student Records: External Program Participation
Student Records: International Students
Student Records: Special Needs
Student Registrations/Applications
Student Reporting Suspensions/Expulsions
Timetables/Schedules
Transfers/Exits/Admittances/Retirements
Transportation: Student Bus Services
Visitor Logs

Record Series Descriptions

Administration

Associations and Organizations: Includes reports, newsletters, publications, conference and workshop information and proceedings from organizations to which staff belong.

Audio Visual Services: Includes all records pertaining to bookings, distributions, copying and cataloguing.

Forms Inventory: Includes blank copies of forms, kept on file for convenience.

Library Management: Includes records related to board/school library operations. Records include collection inventories, correspondence, acquisition and disposal planning and strategies, and other records related to library holdings and operations.

Meeting Documentation Internal: Includes records regarding staff meetings, student council and committees such as principals' council, secretaries' meetings, as well as district and subject head meetings. Records include agendas, minutes, reports and resolutions. Excludes governance.

Meeting Documentation External: Includes records of external committees and councils on which board and school staff members participate as members. Records include agendas, reports, resolutions and any documentation which reflects obligations of the board.

Policing Arrangements: Includes correspondence between schools and police departments regarding extra duty officers, police visits to schools, and related items.

Records Destruction Notices: Documentation relating to which records have been destroyed in the normal course of business. This includes lists of destroyed records and forms authorizing the destruction of records.

Records Management Listings and Reports: Includes information regarding the management of records, regardless of medium. Records include Classification Scheme, file lists, lists of records in storage, records management reports and related correspondence.

Requests for Information: Includes requests and tracking sheets for Freedom of Information Requests made under the Municipal Freedom of Information Act and requests for access to student/employee records and information.

Service Requisitions and Reports: Includes records relating to translation, duplicating/ printing services and mail/courier and delivery services. Records include requisitions and memos for services, confirmations and service logs/reports, correspondence, reports.

Vendors/Suppliers/Contractors: Includes information about vendors, contractors and suppliers and their goods and services. Records include catalogues, price lists and correspondence. This excludes agreements and purchasing documentation.

Communication and Public Relations

Advertisements: Includes publications, artwork and copies of advertisements placed by the board or schools.

Appreciations and Commendations: Includes general commendations, certificates of appreciation and petitions received from the general public and parents. Excludes: records relating to specific employees or student records.

Communication: Includes memos, brochures, correspondence and related information about programs and activities sponsored by the board or by schools.

Complaints: Includes records related to general complaints about the board/authority/ school and its activities. Includes correspondence, investigations, findings and related reports regarding resolution. Complaints about a specific project or program may be contained within the program. Excludes complaints specific to an individual student or staff member – see case files.

Contacts and Mailing Lists: Includes lists of individuals or organizations with whom the board/authority and school communicate. Records include mailing lists, emergency contact lists, student lists.

Events, Ceremonies and Celebrations: Includes memos, notices, correspondence with parents and others, programs and all related materials pertinent to events sponsored by the board or by schools (e.g., parents' night, school opening ceremonies, reunions, etc.). Records include program schedules, correspondence, brochures, and event activity details.

Media Relations, Communications and News Releases: Includes records regarding board relations with the various media. Includes press releases and information releases, speeches, photographs, correspondence.

Memorabilia: Includes school/board memorabilia, collectibles and other historical items that reflect the individual nature of the schools, such as informal school/board/ authority histories, school logos and crests, songs.

Multimedia Materials: Includes photographs, slides, videotapes, CDs, DVDs, recordings, etc. that document school and board activities.

News Reports: Includes news reports from newspapers, magazines, websites and other publications regarding the board/ authority, school, staff, students and trustees. May be paper or electronic.

Publications Internal: Includes records and artwork for publications such as yearbooks, curriculum handbooks, school handbooks, school calendars, "Welcome to High School" booklets, annual reports, brochures on programs offered by schools, newsletters, and other school promotions.

Speeches and Presentations: Includes speeches and presentations delivered by board/authority/school staff, elected officials and teachers covering non-classroom topics.

Websites: Includes snapshots of website content and copies of web pages created by school boards for general public use. Includes board/authority and school sites.

Facilities Management

Audio Visual Services: Includes records pertaining to equipment repair.

Building and Site Approvals: Includes documentation such as site plan approvals, building permits, Life Safety Plan and municipal reports pertaining to the approval of building plans by the municipality, Fire Marshal's Office, Ministry of Education, Ministry of Health, and other government bodies.

Confined Spaces: Includes records relating to the assessment of confined spaces and written plan and procedures for the control of hazards in confined spaces.

Designated Substance and Hazardous Material Monitoring: Hazardous, Biological, Chemical or Physical Agents: Includes records regarding the monitoring of hazardous chemical and physical agents and designated substances in accordance with the Occupational Health and Safety Act. Includes air quality reports. Excludes exposure records of workers.

Designated Substance and Hazardous Materials: Waste monitoring and Management: Includes records related to the management and disposal of chemical, biological or physical agents or substances.

Drawings and Specifications: Includes technical specifications for a project or property, e.g., mechanical, electrical and structural. Includes building and fire code requirements and architect's instructions. Includes all drawings and plans of schools and offices, such as master drawings and floor plans, site plans, aerial plans, and plans for additions and alterations.

Emergency Plans: Includes records regarding emergencies and related plans to support the board/authority/school in case of fire or other emergencies. Records include emergency plans, business continuity plans, call lists, supplier/vendor contacts, and related reports.

Facilities Construction Projects: Includes budgets, estimates, project plans and schedules, progress reports, project meeting minutes, certificates of clearance, project drawings and correspondence regarding the building of schools and other properties.

Facilities Planning: Includes records regarding the allocation of classroom and workspace to staff and students. Records include correspondence, proposed enrolment studies and reports, facilities use plans, facilities designs and layouts, furniture layouts.

Inspection and Testing Logs and Reports: Includes all documentation to support the inspection and testing of buildings, equipment, physical plant and property. Records include logs, inspection reports, year-end reports, equipment lists and locations. Includes water flushing logs, water testing reports, elevator logs, sanding and salting logs, playground equipment inspections logs, chemical treatment log, underground storage tank inspections, playground inspections, physical education equipment inspections, technical program equipment, etc.

Inspection Logs and Reports: Fire Protection Equipment and Emergency Power Systems: Includes records regarding the inspection and testing of emergency power systems, fire extinguishers and fire protection systems.

Land Surveys: Includes land survey information such as legal property surveys, construction layout and control surveys, and field notes. Also includes soil-boring reports.

Maintenance and Operations: Buildings, Physical Plant, Equipment: Includes records related to support the maintenance and operations of buildings, physical plant and equipment.

Maintenance and Operations: Grounds: Maintenance requisitions, work orders, logs and reports showing action taken re grounds keeping, snow clearance, and cleaning.

Material Safety Data Sheets: Includes material safety data sheets as created and issued by the manufacturer.

Permits/Facility Bookings: Includes copies of permits issued by the board/ authority 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.

Security: Includes records regarding the security of office and school facilities and properties such as control of keys, trespassing, surveillance reports, emergency telephone numbers/contacts, and police station locations. Also includes school visitor book and contractor logs, etc.

Vehicles/Fleet Management: Includes records of all vehicles currently owned, operated and maintained by the board.

Business and Financial Services

Accounts Payable: Includes records documenting funds payable such as legal fees, trustees and employee expenses, vendor transaction listings, payment vouchers, cheque requisitions, gas, hydro and phone bills, petty cash disbursements. PIB for staff and board expense.

Accounts Receivable: Records related to the accounting for money owed to schools and boards. Records include invoices, cash receipts, correspondence, cash lists and statements of account.

Articles of Incorporation, By-law and Constitution: Records related to the incorporation of the school board and any associated documentation.

Audits Financial: Includes records regarding internal and external financial audits of accounts.

Banking and Cash Management: Includes records regarding banking transactions and relationships with banks. Includes bank statements, bank reconciliations, deposit records, cancelled cheques, cheque stubs and money order rates.

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.

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.

Capital Revenue: Includes records related to capital revenue from sale of property and rental income from leased premises and other sources.

Financial Forecasts and Reports: Includes records relating to general ledger balancing, including GL reports, variance reports, yearly schedule, and variance report changes.

Financial Statements: Includes the balance sheet, income statement, statement of source and application of funds, and other audited financial statements.

Financial Work Papers: Includes all drafts, grant calculations and other working papers associated with the development of financial statements.

Funding Assessments: Includes records relating to the direction of school support, levies and related assessments. Also includes information on fee-paying, non-resident and international visa students.

Funding – External Sources: Records relate to bequests and donations, grants and subsidies (including government), and Intensive Support Amount (ISA) claims. Records include correspondence, background information and supporting documentation.

Funding Student Council: 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.

Fundraising Charitable Organizations: Includes records regarding the raising of funds for charitable organizations. Records include completed contribution forms, promotional materials for fundraising and reports.

Income Tax Returns: Records relating to federal and provincial income tax returns, including signed income tax returns and supporting documents submitted to federal and provincial tax agencies.

Insurance Policies: Records relating to policies to cover loss or damage to property or premises and cover staff and general public against injury or death resulting from accidents on school/ board/authority premises or occurring during employment. Records include insurance policies, documentation regarding the annual review of insurance policies, certificates, appraisals and related correspondence.

Inventory Control: Fixed Assets: Records relating to the balance sheet, including fixed asset listings, depreciation details, asset transfer information, and details of extraordinary entries.

Inventory Control: Non-fixed Assets: Includes all records regarding inventories of board-/authority-owned equipment.

Investments: Includes records regarding the board's investments, term deposits and promissory notes. May also include records of investments in fuel for later sale to individual schools and other organizations involved in the bulk purchase. Includes records regarding the debentures and bonds issued. Includes information on the initial issuance of the debenture or bond and records of payments made to investors.

Journal Vouchers and Entries: Includes completed journal voucher forms, input forms, and all background documentation used to substantiate journal entries.

Ledgers: General: Includes all records in the books of original entry, whether maintained in book format or as a computer report.

Ledgers: Subsidiary and Journals: Includes all subsidiary ledgers, registers and journals such as payment and receipt journals, payroll registers, purchase order registers, and year-end adjustments.

Payroll Management: Includes all records of payments of salary, wages and deductions to employees. Includes payroll master cards, time sheets, direct deposit request forms, payroll update logs, holdbacks, and payroll deduction and billing reports. Also includes T4's, TD's, and ROE's.

Pension Contributions and Support: Includes contribution cards detailing pension and benefits obligations due to retired employees under OMERS and other annuity or superannuation plans (TPP). Includes payroll records required to determine and verify pension payments.

Pension Plans: Includes general information on OMERS, TPP and other annuity or superannuation plans and annual information returns.

Purchasing Documentation: Records supporting purchases made by the school/board/authority. Includes purchase requisitions, purchase orders, requests for proposal, requests for quotations, specifications, invitations to tender, proposals, tender submissions, bid and performance bonds, and all documentation regarding the selection process.

Sales and Property Tax Returns and Reports: Includes records documenting taxation such as gas surtax reports, income tax returns, and federal sales tax tables. Also includes Harmonized Sales Tax returns and requests for rebate.

Transportation Reports and Costing: Includes records on bus route costing, fuel rates, bus capacity loading, and records regarding the escalation and de-escalation of fuel prices for vehicles and buses and its impact on the Bus Transportation Contract with the Bus Line Operators.

Governance and Policy

Appointments: Board and Committee: Includes records on recommendations made by the board regarding appointments to other local boards such as the library board, board solicitors, banking authority and auditor.

Articles of Incorporation, By-laws and Constitution: Includes records related to the operation of the school board and capture details about the legal entity.

Audits: Includes audits of programs, curriculum plans, and related board/authority and school activities undertaken by the Ministry of Education.

Guidelines, Policies and Directives: External: Includes documentation about initiatives and guidelines provided by the Ministry of Education. Records include memoranda, directives, and correspondence such as the OSR Guideline, Safe Schools Guidelines and Ministry Policy/Program Memoranda.

Guidelines, Policies and Directives: Internal: Includes records relating to board and school operating practices and activities. policy and procedure manuals, guidelines and directives, and all other policies and procedures established by the board, departments and schools, such as accounting procedures, emergency procedures, evaluation procedures, records management, personnel, and attendance reporting procedures.

Intergovernmental Reporting and Communication: Includes correspondence and reports between the board and various levels of government such as the municipality, provincial ministries, etc. Also includes correspondence and information on other school boards.

Meetings: Board of Directors: Includes agenda and related reports meetings, working notes used in agenda preparation, minutes, resolutions and meeting briefs.

Meetings: Governance Committees and Councils: Includes agenda and minutes of school standing, advisory and ad hoc committees. May include school council, administrative council, directors' council; steering, standing, and advisory committees; task forces; the Employee Assistance Program advisory committee; and Special Education advisory committee, the Safe Schools Committee.

Organization Structure: Includes records regarding reporting relationships, organization structure, organization analysis, etc. For both schools and school boards/authorities. Includes organizational charts and school profiles.

Trustee Management: Includes clerk's certificate, elections information, personal information, directories and news items regarding the trustees. Also includes trustees' distribution and orientation information.

Human Resources

Attendance of Employees: Includes records regarding employee attendance, absences (leaves and sabbaticals) and vacations. Records include details about vacation schedules, hours of work, absenteeism reports and related reports from the HRIS systems.

Criminal Background Checks and Declarations: Includes records listing any criminal code convictions that have not been pardoned for all existing and new employees, service providers and volunteers that come into direct contact with students on a regular basis. Includes annual offence declaration.

Employee Benefit Plans: Includes brochures, rates, quotes, correspondence and explanatory documents regarding benefits offered to employees such as group insurance, dental plans, benefit rate changes and premium adjustments.

Employee Disability Claims: Includes records pertaining to long-term and short-term disability.

Employee Incident/Accident Reports: Includes reports of accident/injury to board/authority employees under the *Workplace Safety and Insurance Act* and designated substances exposure records under the Occupational Health and Safety Act. Records may include: doctor's notes, follow-up notes and related correspondence, and short-term and long-term disability claims for both teaching and support staff and record of administration of first aid.

Employee Records: Includes records regarding the employment history of the board/authority or school employees. Includes initial resume and applications, internal applications, benefit enrollment forms, salary calculation forms, change advice, employee master record cards, certification of level placement, probationary contract, key tasks, and employee verification forms. Includes teaching and support staff.

Employee Surveys: Includes surveys and research conducted on board/authority staff regarding issues and planning that affect them.

Employment Equity Program: Includes records and historical information regarding employment equity.

Health and Wellness: Includes records pertaining to the employee assistance program and accommodations.

Health and Safety Committee: Records include reports, correspondence, minutes of health and safety committee meetings, notices, correspondence and reports.

Human Resource Planning: Includes records of succession planning, staff allocations, staff turnover, staff mobility, promotions, transfers and related records.

Incidents: Discrimination and Harassment: Includes records of incidents involving staff and students, incident reports, investigations, and correspondence regarding these issues. Excludes appeals/hearings.

Incident Reports: Health and Safety and Student Safety: Includes general records relating to incidents that affect health and safety of staff and/or students, e.g., emergency response, school illness, infections, quarantines, etc. Records include reports, correspondence and summaries and information related to actions taken by staff. Excludes medical health records.

Job Descriptions: Includes job descriptions and specifications as well as background information used in their preparation or amendment. Also includes positions of responsibility.

Labour Relations: Includes records regarding the administration and interpretation of the board's collective agreements and includes seniority lists, implementation plans, sub plans, and related records. Also includes records related to collective bargaining, e.g., final offers, memoranda of settlement, mediations, arbitrations, and scatter grams used in preparation for bargaining. Also includes records regarding grievances filed by employees, such as evaluation reports, notifications, correspondence with unions concerning grievance initiators, and legal opinions. Excludes collective agreement.

Labour Relations Union Certification: Includes original documents concerning the certification of labour unions.

Medical Records: Employee: Includes doctor's notes, correspondence, and health reports related to an employee's medical situation.

Medical Records: Hazardous Materials Exposure: Records of exposure to asbestos and other hazardous materials.

Pay Equity: Includes records regarding the establishment and implementation of the board's/authority's pay equity plan. Records include background information, consultant information, questionnaires, interview documentation and job evaluation plans.

Performance Appraisals: Includes records of job performance appraisals on all employees according to established timelines and criteria through board/ authority procedures.

Professional Development Participation: Includes records relating to invitations, approvals and registrations for internal and external training events, seminars and workshops.

Professional Development Programs and Materials: Includes records regarding courses and conferences facilitated by the board/ authority for staff development and information on career and professional development programs. Also includes conference proceedings and presentations, orientation materials and staff development calendars.

Recruitment and Hiring: Includes records regarding the recruitment of staff. Includes job postings, copies of advertisements, competitions and resumes of candidates selected for interviews.

Resumes and Job Applications: Records include applications, resumes and applicant evaluations to support recruitment in the school and school board/ authority. Excludes resumes of candidates selected to be interviewed.

Salary Administration: Includes records regarding the planning and scheduling of salaries, such as job evaluations, job classification systems, salary surveys and schedules, salary increments, service pay and substitution pay.

Staff Awards, Certificates and Bursaries: Includes records relating to special recognition and awards presented to staff.

Temporary Resourcing: Includes correspondence, requests for temporary help, lists of floater secretaries/supply teachers, etc.

Training – Legislated: Includes records related to staff training mandated by legislation or board policy including confined space general and specific training, WHMIS training, etc.

Training – Non-Legislated: Includes records related to staff training which are not mandated by legislation but documented. These records may include behavior management training, internal staff training etc.

Volunteers: Includes records of volunteer programs such as recruitment workshops, annual receptions and volunteer activities in schools. Records include volunteer guidelines, correspondence, and volunteer program details.

Information and communications Technology

Access Control and Password Records: Records related to the management of and access to programs. Also includes individual access, password management.

Computer System Design and Architecture: Records relating to the design of computer systems and/or software, including needs assessments, business cases, process flowchart documentation, user and system requirements, specifications, testing plans and results, user sign-offs, project management meeting minutes/documentation, system development documentation, software design records, and software inspection notes. Also includes records on system installations/conversions and product evaluations. Also includes requests for significant modification, fixes and upgrades.

Information Systems Production Activity and Control Files: Records relating to computer system operations and backup information. Also includes activity logs, trouble tickets, change control sheets, change orders, file access control reports, system changes, and mainframe access forms.

OnSIS Reporting: Includes all counts and projections documenting enrolments in the school system and statistical reports required by the Ministry of Education as part of the funding process for the preparation of educational statistics.

Telecommunication Systems: Records relating to the management and maintenance and use of telecommunications equipment. Also includes system documentation, configuration details and services provided.

Legal Matters

Accident/Incident Claims and Reports: Includes reports related to student accidents that occur on board/authority property, schools and the administration offices or on school trips. Records include claims, communications, investigations, reports, administration of first aid and action taken as a result of the accident. Includes reports to Ontario School Board Insurance Exchange. Excludes claims/ litigations, WSIB claims/ reports.

Acts and Legislation: Includes single copies of Acts and Regulations, bills and judgments relevant to the board's/authority's activities, as well as correspondence and discussion papers concerning the Acts and Regulations and amendments to them.

Appeals and Hearings: Includes records of hearings conducted with regard to issues that affect the school/board/ authority. Records include correspondence, reports, discovery findings, hearing proceedings and final decisions.

Claims and Litigation: Includes all liability claims and litigation against or entered into by the boards/authorities and schools. Records include reports, correspondence, investigations, etc.

Contracts and Agreements: Correspondence and information related to contracts and agreements.

Deeds and Titles: Includes original deeds to any board-/authority-owned property.

Legal Opinions/Precedent: Records relating legal opinions and precedents about legal issues identified by the school/board/authority. Records include case law, correspondence, reports, and findings/opinions provided to requestor.

Property Acquisitions and Sales: Includes land purchase agreements, development agreements, property appraisals, valuations and quotes concerning land owned by the board/ authority or under consideration for purchase. Also includes plans, correspondence, reports and backup documentation relating to the acquisition or sale of lands.

Property Damage/Trespassing Reports: Includes reports and general correspondence regarding property damage, theft or loss. Also includes vandalism reports, copies of repair invoices, monthly and annual summaries.

Transportation Accidents: Includes reports and general correspondence accidents. Also includes accident reports and follow-ups as well as bus accident communication notes.

Program Development and Design

Outlines/Courses of Study: Includes outlines of available programs and courses of study.

Program Development and Design: Includes proposals, correspondence and curriculum development materials including writing projects teaching units, lesson plans, blank examinations, testing ideas, songs, games, music sheets and other learning materials.

Program Planning: Includes proposals for new curriculum program, either system-wide or at the school level. Includes meeting notes and reports. Also includes material regarding comparisons with programs in other school boards, provinces and countries. Includes program review reports and other valuations of specific programs in the curriculum. Also includes EQAO test results.

Program/Curriculum Guidelines: Includes Ministry/board/ authority guidelines, directives, approved texts and software lists, and related correspondence concerning the provision of specific programs in the curriculum (e.g., junior/senior kindergarten, French immersion).

Programs and Services: Community: Includes records such as Education Week, summer arts camp, mentorship for Immigrants and community use of schools, day care services and safety and awareness programs. Also includes program reviews and reports of the activities of community liaison officers.

Programs: Continuing Education: Includes objectives, lesson units, principal reports, program reviews, teaching materials and related records used in continuing education programs (such as heritage awareness, second language, multicultural, seniors' programs).

Programs: Parks and Recreation: Includes correspondence and records of programs such as swimming and fitness made available through municipal Parks and Recreation or the YMCA.

Research and Planning

Planning School Boundaries: Includes information relevant to the establishment of school boundaries for purposes of enrolment and facility use. Includes boundary descriptions, school attendance areas and maps.

Planning School Enrolments: Includes records regarding planning and development issues within the municipality that may have implications on enrolments within the school system. Includes subdivision plans, official plan amendments, Ontario population reports, and traffic studies.

Reference Materials: Includes information gathered as background data to support research and other activities within the board/authority and the school. Information may include articles, white papers, research reports, and information from other schools and boards.

Research Curriculum/Program Research: Includes records of any research conducted into curriculum or program development, such as questionnaires, interest surveys and independent research studies.

Research Data and Work Papers: Includes records of any data, work papers conducted for research, including reports and activities.

Research Projects: Curriculum/Program: Includes records of any research conducted into curriculum or program development, such as questionnaires, interest surveys and independent research studies.

Research Projects: School System: Includes records relating to internal and external research. Records include applications, surveys and research reports undertaken to capture information about school system issues; student evaluation and scoring systems and student backgrounds; school and career selection; and external research. Records include applications, surveys and research reports and census data.

Research Projects: Student Demographics: Includes aggregate reports profiling the characteristics of the student population, such as age, grade, promotion, and country of birth, religion, and other trend data.

Research Requests: Includes external applications to conduct research from sources such as universities, graduate students, and foundations, and their final reports.

Strategic Planning: Includes all strategic and operational planning documents, and mandates, as well as related correspondence and background and reference information.

Student Services

Annual Forms: Includes Computer Use, Data Verification, Insurance.

Bursaries and Awards: Includes records regarding bursaries and awards presented to students at commencement or graduation.

Case Files: Attendance Issues: Includes records for students who are referred for counseling on attendance problems. Also includes Supervised Alternative Learning for Excused Pupil records.

Case Files: Counseling: Includes case files of students who are referred for behavioural difficulties, psychological testing, speech and language issues, and social worker reports. Records include referrals, reports, and case notes.

Case Files: Placement Assessments: Records relating to the assessments of students to determine their language background, immigration status, educational history and vocational testing.

Case Files: Referrals: Includes a compilation of all records for individual students who are referred for student services. Includes final summaries, confidential reports, and consents to disclosure and referral forms (e.g., IPRC). May include home instruction/home schooling records.

Case Files: Student Welfare: Includes correspondence and confidential reports regarding students where there is suspicion of child abuse, neglect or family violence.

Educational Services: Includes clinical records, SEA and SIP claims/reports, ECPP Ministry reports, Referrals, IPRCs.

Examinations and Testing: Includes records regarding student exams and/or province-wide testing (e.g., EQAO). Records include correspondence, exam day schedules, exam day attendance and originals of completed student examinations. Excludes master copies of blank exams.

Extracurricular Activities: Includes records regarding school extracurricular activities such as clubs, choir, student council, and athletics.

Guidance Materials: Includes brochures, calendars, description sheets and catalogues relating to career opportunities, external school programs, post-secondary education, private schools, and scholarships to support students.

Homeschooling: Includes all correspondence related to the withdrawal of students from in-class school and ongoing communications with families.

Office Index Cards: Includes all office index cards containing personal information, as well as retirement/transfer information on individual students, which is available for immediate access and as OSR backup information. The OIC may be retained electronically if a hard copy can be readily produced.

Ontario Student Records: Includes original Ontario Student Record folders with all documentation maintained for the OSR system, such as final student report cards and Ontario Student Transcripts, records of instruction in French/Native as a second language, documentation file, Special Education programs and SALEP. May include reports from third parties in accordance with the Ministry's Guideline.

Programs: Cooperative Education: Includes correspondence with potential employers, surveys, and monthly monitoring teacher reports, statistics and other records of co-operative education programs. Also includes apprenticeship programs.

Programs: Non-Classroom: Includes records regarding student exchanges and field trips and arrangements for special events related to specific programs, such as concerts, festivals, track meets, facility tours, tournaments, art or essay contests, and science fairs. Records include correspondence, plans, schedules, etc.

Registers: Student Enrolment and Attendance: Includes registers and reports concerning the enrolment/attendance of students, recording of daily attendance,

and daily absence reports. Also includes class registers for non-school system programs such as continuing education, and heritage language programs.

Registers: Student Marks: Includes information on students' courses completed, marks received and mark verification sheets. Also includes electronic records. Excludes report cards.

Student Exchanges: Includes information on plans for exchanges, exchange reports and exchange schedules.

Student Health Records: Includes medical and health information regarding students required for the care and treatment of students in the school setting. Includes pediculosis, medical emergency plans, administration of medication plans and other health related materials.

Student Meal Programs: Includes records of school milk and breakfast programs, such as lists of students involved in the programs.

Student Records: Continuing Education: Includes mature student appraisals, marks and other student-centred records for continuing education courses.

Student Records: Co-op Programs: Includes records of individual students participating in co-operative education work assignments, such as copies of work education agreements, evaluation forms for employer interviews, training plans and applications for programs, and student evaluation forms.

Student Records: External Program Participation: Includes requests, consent/permission forms, correspondence and reports regarding school field trips and reports relating to the student(s) involved in student exchanges.

Student Records Special Needs: Includes records for students requiring special equipment to assist in the instruction of the student. Includes records of individual students who are referred for placement in special program classes, such as applications for admission, tests, assessments and raw data (e.g., IEP).

Student Registrations/Applications: Includes registration forms and applications for school entry or special programs such as French Immersion, summer school or continuing education. Also includes copies of applications to universities and colleges, etc.

Student Reporting: Includes all reports concerning individual students that are retrievable by student name or other identifier, such as first language reports, non-resident student reports, class list reports, Ontario Scholar lists, tape dumps, student online transaction listings and Student Information System edits.

Suspensions/Expulsions: Includes records of students who are suspended/expelled from school and all school-related activities in accordance with the *Education Act*. Includes investigative notes, reports and appeal records.

Timetables/Schedules: Includes elementary course timetables, secondary school course calendars, yard duty schedules, school year calendars, school bell schedules, and related records.

Transfers/Exits/Admittances/Retirements: Includes reports and forms recording the transfer, exit, room changes, promotions or admittance of students from schools. Also includes signed and dated forms authorizing student admissions, transfers or retirements.

Transportation: Student Bus Services: Includes records concerning transportation/busing for transportation of students to and from schools, Special Education, field trips, and special programs. Records include bus schedules, requests for transportation, bus routes, boundaries and student lists (names and addresses)

Visitor Logs – Includes logs for staff, professional services and public access to school sites.

Classification Index

Administration

FUNCTION	RECORD SERIES	SUBJECT FILING
ADM	Associations/Organizations	Block Parents
ADM	Associations/Organizations	Community Organizations
ADM	Associations/Organizations	Catholic Principals' Council of Ontario
ADM	Associations/Organizations	Ontario Association of School Business Officials
ADM	Associations/Organizations	Ontario Catholic School Trustees Association
ADM	Associations/Organizations	Ontario School Counselors' Association
ADM	Associations/Organizations	School Advisory Councils
ADM	Audio-Visual Services	Audio-Visual Bookings
ADM	Audio-Visual Services	CanCopy
ADM	Audio-Visual Services	Distribution and Use of AV Materials
ADM	Audio-Visual Services	Film Catalogue
ADM	Forms Inventory	Blank Forms
ADM	Library Management	Collection Titles
ADM	Library Management	Delivery Listings
ADM	Library Management	Library Holdings
ADM	Library Management	Library Operations
ADM	Library Management	Overdue Item Listings
ADM	Meeting Documentation - Internal	Department Meetings
ADM	Meeting Documentation - Internal	District Head Meetings
ADM	Meeting Documentation - Internal	Liaison Committee Meetings
ADM	Meeting Documentation - Internal	Managers' Meetings
ADM	Meeting Documentation - Internal	Principals' Meetings
ADM	Meeting Documentation - Internal	Project Team Meetings
ADM	Meeting Documentation - Internal	Secretaries' Meetings
ADM	Meeting Documentation - Internal	Subject Head Meetings
ADM	Meeting Documentation - External	Accessibility Committee
ADM	Meeting Documentation - External	Municipal Information Systems Association
ADM	Meeting Documentation - External	Ontario Association of School Business Officials
ADM	Meeting Documentation - External	Ontario Public School Board Association
ADM	Meeting Documentation – External	Privacy and Information Management Team
ADM	Meeting Documentation – External	Transportation Consortium
ADM	Policing Arrangements	Community Liaison Officers
ADM	Policing Arrangements	Police Visits to Schools move to admin

ADM	Records Destruction Notices	Destruction Authorization Notice
ADM	Records Destruction Notices	List of Destroyed Records
ADM	Records Management Listings and Reports	File Lists
ADM	Records Management Listings and Reports	Lists of Records in Storage
ADM	Records Management Listings and Reports	Records Management Program and Manuals
ADM	Records Management Listings and Reports	Retention Schedules
ADM	Requests for Information	Access to Student Records
ADM	Requests for Information	Freedom of Information
ADM	Requests for Information	MFIPPA
ADM	Requests for Information	Requests for Information
ADM	Service Requisitions and Reports	Courier Services
ADM	Service Requisitions and Reports	Printing Services
ADM	Vendors/Suppliers/Contractors	Price Lists
ADM	Vendors/Suppliers/Contractors	Vendor Catalogues
ADM	Vendors/Suppliers/Contractors	Vendors and Suppliers Lists

Communications & Public Relations

FUNCTION	RECORD SERIES	SUBJECT FILING
COM	Advertisements	Tender Advertisements
COM	Advertisements	Plant
COM	Advertisements	Communications
COM	Advertisements	Finance
COM	Advertisements	Administration
COM	Advertisements	IT
COM	Appreciation and Commendations	Appreciation Letters
COM	Appreciation and Commendations	Certificates of Appreciation
COM	Appreciation and Commendations	Commendations
COM	Communication	Program Brochures
COM	Communication	Program Outlines
COM	Complaints	School Activities
COM	Complaints	School Board/Authority Activities
COM	Contacts and Mailing Lists	Emergency Contact Lists
COM	Contacts and Mailing Lists	Mailing Lists
COM	Contacts and Mailing Lists	Parental Emergency Contact Lists
COM	Contacts and Mailing Lists	Student Lists
COM	Events, Ceremonies and Celebrations	Anniversaries

COM	Events, Ceremonies and Celebrations	Bake and Craft Sales
COM	Events, Ceremonies and Celebrations	Book Fairs
COM	Events, Ceremonies and Celebrations	Career Days
COM	Events, Ceremonies and Celebrations	Christmas Concerts
COM	Events, Ceremonies and Celebrations	Education Week
COM	Events, Ceremonies and Celebrations	Graduations
COM	Events, Ceremonies and Celebrations	Accommodation Review Processes
COM	Events, Ceremonies and Celebrations	Parent's Night
COM	Events, Ceremonies and Celebrations	Recruitment Events
COM	Events, Ceremonies and Celebrations	Remembrance Day
COM	Events, Ceremonies and Celebrations	Retirement
COM	Events, Ceremonies and Celebrations	Food Days
COM	Events, Ceremonies and Celebrations	Spring Concert
COM	Media Relations, Communications and News Releases	Information Releases
COM	Media Relations, Communications and News Releases	Media Communications
COM	Media Relations, Communications and News Releases	Media Contact Lists
COM	Media Relations, Communications and News Releases	News Releases
COM	Media Relations, Communications and News Releases	Press Releases
COM	Memorabilia	Board Memorabilia
COM	Memorabilia	Crests
COM	Memorabilia	School Histories
COM	Memorabilia	School Logos
COM	Memorabilia	Songs
COM	Memorabilia	Uniforms
COM	Multimedia Materials	Audio Tapes
COM	Multimedia Materials	Class Photographs
COM	Multimedia Materials	Officials' Photographs
COM	Multimedia Materials	Photographs
COM	Multimedia Materials	Recordings
COM	Multimedia Materials	Slides
COM	Multimedia Materials	Trustee Photographs
COM	Multimedia Materials	Videotapes
COM	Multimedia Materials	Yearbook Photographs
COM	News Reports	News Clippings
COM	Publications: Internal	Annual Reports
COM	Publications: Internal	Artwork

COM	Publications: Internal	Curriculum Handbooks
COM	Publications: Internal	High School Booklets
COM	Publications: Internal	Newsletters
COM	Publications: Internal	Program Brochures
COM	Publications: Internal	Promotional Material
COM	Publications: Internal	School Calendars
COM	Publications: Internal	School Handbooks
COM	Publications: Internal	Yearbooks
COM	Speeches and Presentations	Presentations
COM	Speeches and Presentations	Speeches
COM	Websites	Content
COM	Websites	Snapshots

Facility Services

FUNCTION	RECORD SERIES	SUBJECT FILING
FAC	Audio Visual Services	Equipment Repair
FAC	Building and Site Approvals	Building Permits
FAC	Building and Site Approvals	Building Plan Approvals
FAC	Building and Site Approvals	Municipal Reports
FAC	Building and Site Approvals	Site Plan Approvals
FAC	Confined Spaces	Confined Space Plan
FAC	Confined Spaces	Hazard Controls
FAC	Confined Spaces	Protective Equipment Use
FAC	Designated Substance and Hazardous Material Monitoring: Hazardous Biological, Chemical or Physical Agents	Air Quality Monitoring
FAC	Designated Substance and Hazardous Material Monitoring: Hazardous Biological, Chemical or Physical Agents	Air Quality Testing
FAC	Designated Substance and Hazardous Materials: Waste Monitoring and Management	Chemicals
FAC	Designated Substance and Hazardous Materials: Waste Monitoring and Management	Disposal of Chemicals
FAC	Designated Substance and Hazardous Materials: Waste Monitoring and Management	Disposal of Hazardous Waste
FAC	Designated Substance and Hazardous Materials: Waste Monitoring and Management	Hazardous Waste

FAC	Designated Substance and Hazardous Materials: Waste Monitoring and Management	Hazardous Waste Inventories
FAC	Drawings and Specifications	Addition Plans
FAC	Drawings and Specifications	Aerial Plans
FAC	Drawings and Specifications	Alteration Plans
FAC	Drawings and Specifications	Architects' Instructions
FAC	Drawings and Specifications	Building Code Requirements
FAC	Drawings and Specifications	Fire Code Requirements
FAC	Drawings and Specifications	Floor Plans
FAC	Drawings and Specifications	Maps
FAC	Drawings and Specifications	Mechanical, Electrical and Structural Specifications
FAC	Drawings and Specifications	Site Plans
FAC	Drawings and Specifications	Technical Specifications
FAC	Emergency Plans	Business Continuity Plans
FAC	Emergency Plans	Emergency Preparedness
FAC	Emergency Plans	Fire Drill Guidelines and Plans
FAC	Emergency Plans	Strike Plans/Facilities
FAC	Facilities Construction Projects	Capital Program Requests
FAC	Facilities Construction Projects	Ceiling Cost Formulas
FAC	Facilities Construction Projects	Drawings and Plans
FAC	Facilities Construction Projects	Impact Statements
FAC	Facilities Construction Projects	Progress Reports
FAC	Facilities Construction Projects	School Building Projects
FAC	Facilities Construction Projects	Building Additions
FAC	Facilities Construction Projects	Building Alterations
FAC	Facilities Construction Projects	Building Improvement Projects
FAC	Facilities Construction Projects	Building Renovations
FAC	Facilities Planning	Allocation of Classrooms
FAC	Facilities Planning	Allocation of Student and Teacher Workspace
FAC	Facilities Planning	Physical Space Layout
FAC	Facilities Planning	Portable Reports
FAC	Facilities Planning	Projected Use of Facilities
FAC	Facilities Planning	School Floor Plans
FAC	Facilities Planning	Space Planning
FAC	Facilities Planning	Space Utilization
FAC	Inspection and Testing Logs and Reports	Elevator Contacts
FAC	Inspection and Testing Logs and Reports	Elevator Log Books

FAC	Inspection and Testing Logs and Reports	Elevator Requests for Service
FAC	Inspection and Testing Logs and Reports	Elevator Service Documentation
FAC	Inspection and Testing Logs and Reports	Playground Safety Reports
FAC	Inspection and Testing Logs and Reports	Spill, Leaks or Soil Contamination
FAC	Inspection and Testing Logs and Reports	Underground Tank Inspections
FAC	Inspection and Testing Logs and Reports	Water Management
FAC	Inspection and Testing Logs and Reports	Water Testing Reports
FAC	Inspection and Testing Logs and Reports	Well Reports
FAC	Inspection and Testing Logs and Reports	Workplace Inspections
FAC	Inspection Logs and Reports: Fire Protection Equipment and Emergency Power Systems	Emergency Power Inspection Reports
FAC	Inspection Logs and Reports: Fire Protection Equipment and Emergency Power Systems	Inspection Reports Fire Extinguishers
FAC	Land Surveys	Construction Layouts
FAC	Land Surveys	Control Surveys
FAC	Land Surveys	Field Notes
FAC	Land Surveys	Property Surveys
FAC	Land Surveys	Soil Reports
FAC	Maintenance and Operations: Buildings, Physical Plant, Equipment	Air Conditioning
FAC	Maintenance and Operations: Buildings, Physical Plant, Equipment	Classroom Equipment
FAC	Maintenance and Operations: Buildings, Physical Plant, Equipment	Cleaning
FAC	Maintenance and Operations: Buildings, Physical Plant, Equipment	Equipment Manuals
FAC	Maintenance and Operations: Buildings, Physical Plant, Equipment	Heating
FAC	Maintenance and Operations: Buildings, Physical Plant, Equipment	Lawnmowers/Snowblowers
FAC	Maintenance and Operations: Buildings, Physical Plant, Equipment	Office Equipment
FAC	Maintenance and Operations: Buildings, Physical Plant, Equipment	Operational Equipment
FAC	Maintenance and Operations: Buildings, Physical Plant, Equipment	Requests for Equipment Maintenance
FAC	Maintenance and Operations: Buildings, Physical Plant, Equipment	School Equipment
FAC	Maintenance and Operations: Buildings, Physical Plant, Equipment	Shop Equipment

FAC	Maintenance and Operations: Buildings, Physical Plant, Equipment	Steam Cleaners and Vacuums
FAC	Maintenance and Operations: Buildings, Physical Plant, Equipment	Ventilation
FAC	Maintenance and Operations: Grounds	Grounds Keeping
FAC	Maintenance and Operations: Grounds	Parking Management
FAC	Maintenance and Operations: Grounds	Pest Control
FAC	Maintenance and Operations: Grounds	Recycling
FAC	Maintenance and Operations: Grounds	Snow Clearance
FAC	Material Safety Data Sheets	Material Safety Data Sheets
FAC	Permits/Facility Bookings	Applications for Permits
FAC	Permits/Facility Bookings	Community Use
FAC	Permits/Facility Bookings	Lists of Permit Holders
FAC	Permits/Facility Bookings	Permits for Use of School Property
FAC	Permits/Facility Bookings	Polling Stations
FAC	Security	Key Control
FAC	Security	Police Station Locations
FAC	Security	Surveillance Reports
FAC	Security	Trespassing
FAC	Vehicles/Fleet Management	Vehicle History Files
FAC	Vehicles/Fleet Management	Vehicle Maintenance Files
FAC	Vehicles/Fleet Management	Vehicle Registration

Business and Financial Services

FUNCTION	RECORD SERIES	SUBJECT FILING
FIN	Accounts Payable	Cheque Requisitions
FIN	Accounts Payable	Employee Expenses
FIN	Accounts Payable	Gas Bills
FIN	Accounts Payable	Hydro Bills
FIN	Accounts Payable	Invoices
FIN	Accounts Payable	Legal Fees
FIN	Accounts Payable	Payment Vouchers
FIN	Accounts Payable	Permit Receipts
FIN	Accounts Payable	Petty Cash Disbursements
FIN	Accounts Payable	Phone Bills
FIN	Accounts Payable	Trustees Expenses
FIN	Accounts Payable	Vendor Transaction Listings

FIN	Accounts Receivable	Freedom of Information
FIN	Accounts Receivable	International Student
FIN	Accounts Receivable	Non-resident Fees
FIN	Accounts Receivable	Permit Revenue
FIN	Accounts Receivable	Records of Income from Fundraising events
FIN	Accounts Receivable	Reimbursements from other Boards
FIN	Accounts Receivable	School Generated
FIN	Accounts Receivable	Student Tuition
FIN	Accounts Receivable	Transportation Fees
FIN	Articles of Incorporation, By-law and	Official documents
FIN	Audits Financial	Financial Audits
FIN	Banking and Cash Management	Bank Reconciliations
FIN	Banking and Cash Management	Bank Statements
FIN	Banking and Cash Management	Cancelled Cheques
FIN	Banking and Cash Management	Cheque Stubs
FIN	Banking and Cash Management	Deposit Records
FIN	Banking and Cash Management	Money Order Rates
FIN	Banking and Cash Management	Signing Authorities
FIN	Budgets	Budget Formula Calculations
FIN	Budgets	Budgeted vs. Actual Reports
FIN	Budgets	Capital Budgets
FIN	Budgets	Current Estimate Highlights
FIN	Budgets	Estimates and Revised Estimates
FIN	Budgets	Grant Calculations
FIN	Budgets	Operating Budgets
FIN	Budgets	Preliminary Formula Budgets
FIN	Capital Projects Financing	Budget Approvals
FIN	Capital Projects Financing	Building Monthly Costs
FIN	Capital Projects Financing	Capital Expenditure Forecasts
FIN	Capital Projects Financing	Capital Payment Vouchers
FIN	Capital Projects Financing	Costing
FIN	Capital Projects Financing	Quarterly Reports
FIN	Capital Projects Financing	Working Papers
FIN	Capital Revenue	Rental Income from Leased Premises
FIN	Capital Revenue	Sale of Property
FIN	Cost Allocations	Allocations of Costs to other Schools
FIN	Cost Allocations	Allocation of Tuition to other Schools

FIN	Financial Forecasts and Reports	Forecasts and Financial Reports
FIN	Financial Forecasts and Reports	GL Reports
FIN	Financial Forecasts and Reports	Variance Reports
FIN	Financial Forecasts and Reports	Yearly Schedules
FIN	Financial Statements	Application of Funds
FIN	Financial Statements	Audited Financial Statements
FIN	Financial Statements	Balance Sheets
FIN	Financial Statements	Income Statements
FIN	Financial Statements	Statement of Source
FIN	Financial Work Papers	Development of Financial Statements
FIN	Financial Work Papers	Grant Calculations
FIN	Funding Assessments	Analysis of Assessments
FIN	Funding Assessments	International Visa Students
FIN	Funding Assessments	Levies and Assessments
FIN	Funding Assessments	Non-resident Students
FIN	Funding - External Sources	Administration of Trust Funds
FIN	Funding - External Sources	Background Information
FIN	Funding - External Sources	Community Support Fund
FIN	Funding - External Sources	Data Sheets
FIN	Funding - External Sources	Donations to the Board
FIN	Funding - External Sources	Foundations
FIN	Funding - External Sources	Fund Histories
FIN	Funding - External Sources	Intensive Support Amount Claims
FIN	Insurance Policies	Insurance Certificates
FIN	Insurance Policies	Agents' Premiums
FIN	Insurance Policies	Insurance Appraisals
FIN	Insurance Policies	Insurance Liabilities
FIN	Insurance Policies	Insurance Policies
FIN	Inventory Control: Fixed Assets	Fixed Assets
FIN	Inventory Control: Non-fixed Assets	Inventories of Board-owned Equipment
FIN	Investments	Board Investments
FIN	Investments	Bonds
FIN	Investments	Debentures
FIN	Investments	Term Deposits
FIN	Journal Vouchers and Journal Entries	Term Deposits
FIN	Journal Vouchers and Journal Entries	Journal Input Forms

FIN	Journal Vouchers and Journal Entries	Journal Vouchers
FIN	Journal Vouchers and Journal Entries	Background Documentation
FIN	Ledgers: General	Books of Original Entry
FIN	Ledgers: General	General Ledgers
FIN	Ledgers: Subsidiary and Journals	Payment and Receipt Journals
FIN	Ledgers: Subsidiary and Journals	Payroll Registers
FIN	Ledgers: Subsidiary and Journals	Purchase Order Registers
FIN	Ledgers: Subsidiary and Journals	Subsidiary Ledgers
FIN	Ledgers: Subsidiary and Journals	Subsidiary Registers
FIN	Ledgers: Subsidiary and Journals	Year-end Adjustment Registers
FIN	OnSIS Reporting	Enrolment
FIN	OnSIS Reporting	Ministry Reports
FIN	OnSIS Reporting	Reports
FIN	Payroll Management	Billing Reports: Payroll
FIN	Payroll Management	Direct Deposit Requests
FIN	Payroll Management	Holdbacks
FIN	Payroll Management	Payroll
FIN	Payroll Management	Payroll Deduction Reports
FIN	Payroll Management	Payroll Credit Cards
FIN	Payroll Management	Payroll Update Logs
FIN	Payroll Management	Salary Payments
FIN	Payroll Management	Timesheets
FIN	Payroll Management	Wage Deductions
FIN	Pension Contributions and Support	Contribution Cards
FIN	Pension Contributions and Support	OMERS Reports
FIN	Pension Contributions and Support	Annuity Plans
FIN	Pension Plans	Annual Information Returns
FIN	Pension Plans	OMERS
FIN	Pension Plans	Teachers Pension Plan
FIN	Purchasing Documentation	Invitations to Tender
FIN	Purchasing Documentation	Product Selection Documentation
FIN	Purchasing Documentation	Proposals
FIN	Purchasing Documentation	Purchase Orders
FIN	Purchasing Documentation	Purchase Requisitions
FIN	Purchasing Documentation	Requests for Quotation
FIN	Purchasing Documentation	Tender Submissions

FIN	Sales and Property Tax Returns and Reports	Federal Sales Tax
FIN	Sales and Property Tax Returns and Reports	Gas Surtax Reports
FIN	Sales and Property Tax Returns and Reports	Harmonized Sales Tax Returns
FIN	Sales and Property Tax Returns and Reports	Requests for Tax Rebates
FIN	Sales and Property Tax Returns and Reports	Tax Assessments
FIN	Transportation Reports and Costing	Bus Capacity Loading
FIN	Transportation Reports and Costing	Bus Cost Reports
FIN	Transportation Reports and Costing	Bus Route Costing
FIN	Transportation Reports and Costing	Fuel Rates

Governance & Policy

FUNCTION	RECORD SERIES	SUBJECT FILING
GOV	Appointments: Board and Committee	Auditor
GOV	Appointments: Board and Committee	Banking Authority
GOV	Appointments: Board and Committee	Board and Committee Appointments
GOV	Appointments: Board and Committee	Board Solicitor
GOV	Appointments: Board and Committee	Library Boards
GOV	Articles of Incorporation, By-law and Constitution	Articles of Incorporation
GOV	Articles of Incorporation, By-law and Constitution	By-laws
GOV	Articles of Incorporation, By-law and Constitution	Constitution
GOV	Audits: Program	Curriculum Plan Audits
GOV	Audits: Program	Ministry Audits
GOV	Audits: Program	Program Audits
GOV	Guidelines, Policies and Directives: External	Engineering Institute of Canada Guidelines
GOV	Guidelines, Policies and Directives: External	Ministry Directives
GOV	Guidelines, Policies and Directives: External	Ministry Guidelines
GOV	Guidelines, Policies and Directives: External	Ministry Memoranda
GOV	Guidelines, Policies and Directives: External	Ministry Policies
GOV	Guidelines, Policies and Directives: External	Ontario Student Record Guidelines
GOV	Guidelines, Policies and Directives: Internal	Accounting Procedures
GOV	Guidelines, Policies and Directives: Internal	Directives
GOV	Guidelines, Policies and Directives: Internal	Emergency Procedures
GOV	Guidelines, Policies and Directives: Internal	Evaluation Handbooks
GOV	Guidelines, Policies and Directives: Internal	Evaluation Procedures
GOV	Guidelines, Policies and Directives: Internal	Guidelines

GOV	Guidelines, Policies and Directives: Internal	Personnel and Attendance Reporting Procedures
GOV	Guidelines, Policies and Directives: Internal	Policies
GOV	Guidelines, Policies and Directives: Internal	Procedures
GOV	Intergovernmental Reporting and Communication	College of Teachers
GOV	Intergovernmental Reporting and Communication	Intergovernmental Correspondence
GOV	Intergovernmental Reporting and Communication	Intergovernmental Reports
GOV	Intergovernmental Reporting and Communication	Members of Parliament
GOV	Intergovernmental Reporting and Communication	Ontario Institute for Studies in Education
GOV	Intergovernmental Reporting and Communication	Provincial Ministries
GOV	Intergovernmental Reporting and Communication	Universities and Colleges
GOV	Meetings: Boards of Directors	Agendas
GOV	Meetings: Board of Directors	Briefs
GOV	Meetings: Board of Directors	Minutes
GOV	Meetings: Board of Directors	Resolutions
GOV	Meetings: Governance Committees and Councils	Ad Hoc Committees
GOV	Meetings: Governance Committees and Councils	Administrative Council
GOV	Meetings: Governance Committees and Councils	Agendas
GOV	Meetings: Governance Committees and Councils	Board Mandated Committees
GOV	Meetings: Governance Committees and Councils	Employee Assistance Advisory Committee
GOV	Meetings: Governance Committees and Councils	Minutes
GOV	Meetings: Governance Committees and Councils	Reports
GOV	Meetings: Governance Committees and Councils	School Councils
GOV	Meetings: Governance Committees and Councils	Special Education Advisory Committee
GOV	Meetings: Governance Committees and Councils	Steering Committees
GOV	Organization Structure	Board Profiles
GOV	Organization Structure	Organization Analysis
GOV	Organization Structure	Organization Charts
GOV	Organization Structure	School Profiles
GOV	Strategic Planning	Background Research Information
GOV	Strategic Planning	Strategic Plans
GOV	Trustee Management	Clerk's Certificates
GOV	Trustee Management	Municipal Elections
GOV	Trustee Management	News Items
GOV	Trustee Management	Trustees Information
GOV	Trustee Management	Trustees Distribution Information
GOV	Trustee Management	Trustees Orientation Information

GOV	Trustee Management	Trustees Personal Files
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Human Resources

FUNCTION	RECORD SERIES	SUBJECT FILING
HUM	Attendance: Employee	Absence Reports
HUM	Attendance: Employee	Employee Attendance Reports
HUM	Attendance: Employee	Employee Vacations
HUM	Attendance: Employee	Hours of Work Reports
HUM	Attendance: Employee	Human Resource Information System Reports
HUM	Attendance: Employee	Leaves of Absence
HUM	Attendance: Employee	Requests
HUM	Attendance: Employee	Schedules/Planners
HUM	Criminal Background Checks and Declarations	Criminal Code Convictions
HUM	Criminal Background Checks and Declarations	Annual Offence Declarations/CPIC
HUM	Employee Benefit Plans	Benefit Brochures
HUM	Employee Benefit Plans	Benefit Quotes
HUM	Employee Benefit Plans	Benefit Rate Changes
HUM	Employee Benefit Plans	Benefit Rates
HUM	Employee Benefit Plans	Dental Plans
HUM	Employee Benefit Plans	Group Insurance
HUM	Employee Benefit Plans	Premium Adjustments
HUM	Employee Claims	Long-Term Disability
HUM	Employee Claims	Short-Term Disability
HUM	Employee Incident/Accident Reports	WSIB
HUM	Employee Records	Applications
HUM	Employee Records	Benefit Enrolment Forms
HUM	Employee Records	Certification of Level Placement
HUM	Employee Records	Employee Master Record Cards
HUM	Employee Records	Employee Verification Forms
HUM	Employee Records	Probationary Contracts
HUM	Employee Records	Records of Employment
HUM	Employee Records	Resumes
HUM	Employee Records	Salary Calculations Forms
HUM	Employee Surveys	Surveys and Research
HUM	Employment Equity Program	Employment Equity Plans

HUM	Health and Wellness	Employee Assistance Program
HUM	Health and Wellness	Accommodation
HUM	Health and Wellness	Return to Work Plans
HUM	Health and Wellness	Staff Injury Reports
HUM	Health and Safety Committee	Health and Safety Inspection Reports
HUM	Health and Safety Committee	Infestations
HUM	Health and Safety Committee	Site Health and Safety Committees
HUM	Human Resource Planning	Allocation of Staff
HUM	Human Resource Planning	Staff Allocation
HUM	Human Resource Planning	Staff Mobility
HUM	Human Resource Planning	Staff Placement
HUM	Human Resource Planning	Staff Promotions
HUM	Human Resource Planning	Staff Transfers
HUM	Human Resource Planning	Staff Turnover
HUM	Human Resource Planning	Succession Planning
HUM	Incident Reports: Health and Safety and Student Safety	Infection Reports
HUM	Incident Reports: Health and Safety and Student Safety	Quarantine Reports
HUM	Incident Reports: Health and Safety and Student Safety	Work Refusals
HUM	Job Descriptions	Job Descriptions
HUM	Job Descriptions	Position Descriptions
HUM	Job Descriptions	Positions of Responsibility
HUM	Labour Relations	Evaluation Reports
HUM	Labour Relations	Grievances
HUM	Labour Relations	Notifications
HUM	Labour Relations	Union Correspondence
HUM	Labour Relations	Administration of Collective Agreements
HUM	Labour Relations	Arbitrations
HUM	Labour Relations	Collective Agreements
HUM	Labour Relations	Implementation Plans
HUM	Labour Relations	Mediations
HUM	Labour Relations	Negotiations
HUM	Labour Relations	Seniority Lists
HUM	Labour Relations	Settlements
HUM	Labour Relations: Employee Relations	Employee Misconduct
HUM	Labour Relations: Employee Relations	Counseling
HUM	Labour Relations: Employee Relations	Discipline
HUM	Labour Relations: Employee Relations	Investigations

HUM	Labour Relations: Employee Relations	Notes/Correspondence
HUM	Labour Relations: Union Certification	Labour Union Certification
HUM	Medical Records: Employee	Health Reports and Assessments
HUM	Medical Records: Employee	Doctor's Notes
HUM	Medical Records: Hazardous Materials Exposure	Asbestos Reports
HUM	Medical Records: Hazardous Materials Exposure	Hazardous Material
HUM	Pay Equity	Consultant Information
HUM	Pay Equity	Interview Documentation
HUM	Pay Equity	Job Evaluation Plans
HUM	Pay Equity	Pay Equity Background Information
HUM	Pay Equity	Pay Equity Plan
HUM	Pay Equity	Questionnaires
HUM	Performance Appraisals	Job Performance Appraisals
HUM	Performance Appraisals	Performance Appraisals
HUM	Professional Development Participation	Approvals for Courses
HUM	Professional Development Participation	Course Registrations
HUM	Professional Development Participation	Invitations to Courses
HUM	Professional Development Participation	Seminars and Workshops: External
HUM	Professional Development Participation	Seminars and Workshops: Internal
HUM	Professional Development Programs and Materials	Career Development Programs: Staff
HUM	Professional Development Programs and Materials	Course Materials
HUM	Professional Development Programs and Materials	Professional Development Programs: Staff
HUM	Professional Development Programs and Materials	Session Descriptions
HUM	Recruitment and Hiring	Applicant Evaluations
HUM	Recruitment and Hiring	Job Advertisements
HUM	Recruitment and Hiring	Job Postings
HUM	Resumes and Job Applications	Job Applications
HUM	Resumes and Job Applications	Resumes
HUM	Salary Administration	Job Classification Systems
HUM	Salary Administration	Job Evaluations
HUM	Salary Administration	Salary Increments
HUM	Salary Administration	Salary Planning
HUM	Salary Administration	Salary Scheduling
HUM	Salary Administration	Salary Surveys
HUM	Staff Awards, Certificates and Bursaries	Staff Awards
HUM	Staff Awards, Certificates and Bursaries	Staff Bursaries
HUM	Staff Awards, Certificates and Bursaries	Staff Certificates
HUM	Staff Listings and Directories	Lists of Supply Teachers

HUM	Staff Listings and Directories	Retirement Lists
HUM	Staff Listings and Directories	Seniority Lists
HUM	Staff Listings and Directories	Staff Directories
HUM	Temporary Resourcing	Lists of Floater Secretaries
HUM	Temporary Resourcing	Practice Teachers
HUM	Temporary Resourcing	Request for Temporary Help
HUM	Temporary Resourcing	Student Teachers
HUM	Temporary Resourcing	Summer Students
HUM	Temporary Resourcing	Supply Teachers
HUM	Training -Legislated	Program Lists
HUM	Training – Non-Legislated	Program Lists
HUM	Volunteers	Criminal Background Check
HUM	Volunteers	Offense Declaration
HUM	Volunteers	Recruitment
HUM	Volunteers	Volunteer Activities
HUM	Volunteers	Volunteer Acknowledgements
HUM	Volunteers	Volunteer Guidelines
HUM	Volunteers	Volunteer Programs

Information Technology Services

FUNCTION	RECORD SERIES	SUBJECT FILING
ICT	Access Control and Password Records	Access Controls
ICT	Access Control and Password Records	Passwords database
ICT	Access Control and Password Records	Software Controls
ICT	Computer System Design and Architecture	Computer Hardware and Software License Agreements
ICT	Computer System Design and Architecture	Assessments
ICT	Computer System Design and Architecture	Flowcharts
ICT	Computer System Design and Architecture	Installation and Conversions
ICT	Computer System Design and Architecture	Project Management and Documentation
ICT	Computer System Design and Architecture	Request for Modification and Upgrades
ICT	Computer System Design and Architecture	Testing
ICT	Information Systems Production Activity and Control Files	Activity Logs
ICT	Information Systems Production Activity and Control Files	Back-ups
ICT	Information Systems Production Activity and Control Files	File Access Control Reports
ICT	Information Systems Production Activity and Control Files	System Changes
ICT	Information Systems Production Activity and Control Files	System Operations
ICT	Information Systems Production Activity and Control Files	Trouble Tickets

ICT	Telecommunications Systems	System Documentation
ICT	Telecommunications Systems	Configuration

Legal

FUNCTION	RECORD SERIES	SUBJECT FILING
LEG	Accident/Incident Claims and Reports	Administration Offices
LEG	Accident/Incident Claims and Reports	Board Property
LEG	Accident/Incident Claims and Reports	School Property
LEG	Accident/Incident Claims and Reports	School Trips
LEG	Accident/Incident Claims and Reports	Student Accidents
LEG	Acts and Legislation	Acts
LEG	Acts and Legislation	Amendments to Regulations
LEG	Acts and Legislation	Bills
LEG	Acts and Legislation	Discussion Papers
LEG	Acts and Legislation	Judgments
LEG	Acts and Legislation	Legislation
LEG	Acts and Legislation	Municipal By-laws
LEG	Acts and Legislation	Official Plans
LEG	Acts and Legislation	Regulations
LEG	Appeals and Hearings	Board Hearings
LEG	Appeals and Hearings	Closing of Schools
LEG	Appeals and Hearings	Final Decisions
LEG	Appeals and Hearings	Freedom of Information Appeals
LEG	Appeals and Hearings	Hearing Proceedings
LEG	Appeals and Hearings	Human Rights Appeals
LEG	Appeals and Hearings	Identification, Placement and Review Committee Appeals
LEG	Appeals and Hearings	Ministry of Education Hearings
LEG	Appeals and Hearings	Official Hearings
LEG	Appeals and Hearings	Pay Equity Appeals
LEG	Appeals and Hearings	Student Suspension Appeals
LEG	Claims and Litigation	Discovery Reports
LEG	Claims and Litigation	Human Rights Claims
LEG	Claims and Litigation	Liability Claims
LEG	Claims and Litigation	Litigation Files
LEG	Contracts and Agreements	Bus Operators
LEG	Contracts and Agreements	Computer Hardware and Software License Agreements
LEG	Contracts and Agreements	Equipment Rental and Service Contracts
LEG	Contracts and Agreements	Leases
LEG	Contracts and Agreements	Partnership Agreements

LEG	Contracts and Agreements	Provincial Government
LEG	Contracts and Agreements	Purchase Agreements
LEG	Contracts and Agreements	Use of Grants
LEG	Contracts and Agreements	Vehicle Leases
LEG	Contracts and Agreements	Work Education Agreements for Co-op Programs
LEG	Deeds and Titles	Deeds
LEG	Deeds and Titles	Titles
LEG	Legal Opinions/Precedent	Legal Opinions/Precedent
LEG	Property Acquisition and Sales	Acquisition of Lands
LEG	Property Acquisition and Sales	Correspondence
LEG	Property Acquisition and Sales	Development Agreements
LEG	Property Acquisition and Sales	Land Purchase Agreements
LEG	Property Acquisition and Sales	Plans
LEG	Property Acquisition and Sales	Property Appraisals
LEG	Property Acquisition and Sales	Reports and Backup Documentation
LEG	Property Acquisition and Sales	Sale of Lands
LEG	Property Acquisition and Sales	Valuations and Quotes
LEG	Property Damage/Trespassing Reports	Copies of Repair Invoices
LEG	Property Damage/Trespassing Reports	Loss Reports
LEG	Property Damage/Trespassing Reports	Monthly and Annual Summaries
LEG	Property Damage/Trespassing Reports	Property Damage Reports
LEG	Property Damage/Trespassing Reports	Theft Reports
LEG	Property Damage/Trespassing Reports	Vandalism Reports
LEG	Transportation Accidents	Accident Follow-up
LEG	Transportation Accidents	Accident Reports
LEG	Transportation Accidents	Bus Accident Communications

Program Development & Design

FUNCTION	RECORD SERIES	SUBJECT FILING
PDD	Outlines/Courses of Study	Available Programs
PDD	Outlines/Courses of Study	Courses of Study
PDD	Outlines/Courses of Study	Program Outlines
PDD	Program Development and Design	Blank Examinations
PDD	Program Development and Design	Curriculum Development Materials
PDD	Program Development and Design	Games
PDD	Program Development and Design	Learning Materials
PDD	Program Development and Design	Lesson Plans
PDD	Program Development and Design	Music Sheets

PDD	Program Development and Design	Songs
PDD	Program Development and Design	Teaching Units
PDD	Program Development and Design	Testing Ideas
PDD	Program Development and Design	Writing Projects
PDD	Program Planning	EQAO Test Results System/Board
PDD	Program Planning	Program Evaluations
PDD	Program Planning	Program Review Reports
PDD	Program Planning	Programs in Other Schools
PDD	Program/Curriculum Guidelines	Approved Tests
PDD	Program/Curriculum Guidelines	French Immersion Programs (Special Ed)
PDD	Program/Curriculum Guidelines	Junior Kindergarten to Grade 12 Programs
PDD	Program/Curriculum Guidelines	Ministry Curriculum Directives
PDD	Program/Curriculum Guidelines	Ministry Curriculum Guidelines
PDD	Program/Curriculum Guidelines	Software Lists
PDD	Programs and Services: Community	Community Use Activities
PDD	Programs: Continuing Education	Heritage Awareness courses
PDD	Programs: Continuing Education	Night School
PDD	Programs: Continuing Education	Second Language
PDD	Programs: Continuing Education	Summer School
PDD	Programs: Parks and Recreation	Fitness Programs
PDD	Programs: Parks and Recreation	YMCA

Research & Planning

FUNCTION	RECORD SERIES	SUBJECT FILING
RPL	Planning: School Boundaries	Boundary Descriptions
RPL	Planning: School Boundaries	School Attendance Areas
RPL	Planning: School Boundaries	School Maps
RPL	Planning: School Enrolments	Official Plan Amendments
RPL	Planning: School Enrolments	Planning and Development Issues
RPL	Planning: School Enrolments	Population Reports
RPL	Planning: School Enrolments	Subdivision Plans
RPL	Reference Materials	Articles
RPL	Reference Materials	Research Reports
RPL	Research Curriculum/Program Research	Questionnaires
RPL	Research Data and Work Papers	Background Research and Data for Research Reports and Activities
RPL	Research Projects: Curriculum/Program	Curriculum Development Research
RPL	Research Projects: Curriculum/Program	Interest Surveys

RPL	Research Projects: School System	Applications
RPL	Research Projects: School System	Census Data
RPL	Research Projects: School System	External Research Reports
RPL	Research Projects: School System	External Surveys
RPL	Research Projects: School System	School and Career Selection Surveys
RPL	Research Projects: School System	School System Surveys
RPL	Research Projects: School System	Scoring System Surveys
RPL	Research Projects: School System	Student Background Surveys
RPL	Research Projects: School System	Student Evaluation Surveys
RPL	Research Projects: School System	Surveys
RPL	Research Projects: Student Demographics	Aggregate Reports: Student Population
RPL	Research Requests	Research Final Reports
RPL	Research Requests	Research Requests from Foundations

Student

FUNCTION	RECORD SERIES	SUBJECT FILING
STU	Annual Forms	Computer Use
STU	Annual Forms	Data Verification
STU	Annual Forms	Student Insurance
STU	Bursaries and Awards	Awards of Achievement
STU	Bursaries and Awards	Graduation Awards
STU	Bursaries and Awards	Student Bursaries
STU	Case Files: Attendance Issues	Attendance Counseling Records
STU	Case Files: Attendance Issues	Counseling Records: Attendance
STU	Case Files: Attendance Issues	Counseling Records: Communications
STU	Case Files: Counseling	Confidential Notes
STU	Case Files: Counseling	Interview Notes
STU	Case Files: Counseling	Psychological Testing/Assessment
STU	Case Files: Counseling	Speech and Language Issues
STU	Case Files: Counseling	Statistical Forms
STU	Case Files: Counseling	Social Worker Counseling and Reports
STU	Case Files: Placement Assessments	Assessment Test Results
STU	Case Files: Placement Assessments	Educational History
STU	Case Files: Placement Assessments	Immigration Status
STU	Case Files: Placement Assessments	Language Background Assessments
STU	Case Files: Placement Assessments	Recommendations for Levels of Placements
STU	Case Files: Placement Assessments	Vocational Assessments
STU	Case Files: Placement Assessments	Vocational Counseling Records

STU	Case Files: Placement Assessments	Vocational Interests Tests
STU	Case Files: Placement Assessments	Vocational Interview Notes
STU	Case Files: Referrals	Communication Counseling
STU	Case Files: Referrals	Confidential Reports
STU	Case Files: Referrals	Consents to Disclosure
STU	Case Files: Referrals	Final Summaries
STU	Case Files: Referrals	Home Instructions
STU	Case Files: Referrals	Referral Forms
STU	Case Files: Student Welfare	Abuse, Neglect, Family Violence
STU	Educational Services	SEA Claims & Reports
STU	Educational Services	SIP Claims
STU	Educational Services	Section 23 CCTC Reports
STU	Educational Services	Referrals to Special Education Programs
STU	Educational Services	EA Allocations
STU	Educational Services	Clinical Staff – Student Assessments
STU	Educational Services	Speech-Language Staff- Student Assessments
STU	Educational Services	IPRCs
STU	Educational Services	Safety Behaviour Plans
STU	Examinations and Testing	Completed Student Examinations
STU	Examinations and Testing	EQAO
STU	Examinations and Testing	Exam Day Attendance
STU	Examinations and Testing	Exam Day Schedules
STU	Examinations and Testing	Student Exams
STU	Extracurricular Activities	Athletics
STU	Extracurricular Activities	Choir
STU	Extracurricular Activities	Clubs
STU	Extracurricular Activities	School Activities
STU	Extracurricular Activities	Student Council
STU	Homeschooling	Letter to Withdraw Student from School
STU	Homeschooling	Confirmation of Continued Homeschooling
STU	Guidance Materials	Career Information
STU	Guidance Materials	College Information
STU	Guidance Materials	External School Programs
STU	Guidance Materials	Post-secondary Education
STU	Guidance Materials	Private Schools
STU	Guidance Materials	Scholarships
STU	Office Index Cards	Index Cards
STU	Office Index Cards	Retirement Information
STU	Office Index Cards	Transfer Information

STU	Ontario Student Records	Ontario Student Records Current
STU	Ontario Student Records	Ontario Student Records Retired
STU	Programs: Cooperative Education	Co-op Programs
STU	Programs: Cooperative Education	Co-op Statistics
STU	Programs: Cooperative Education	Employer Surveys
STU	Programs: Cooperative Education	Monitoring Teacher Reports
STU	Programs: Non-Classroom	Art
STU	Programs: Non-Classroom	Concerts
STU	Programs: Non-Classroom	Essay Contests
STU	Programs: Non-Classroom	Facility Tours
STU	Programs: Non-Classroom	Festivals
STU	Programs: Non-Classroom	Science Fairs
STU	Programs: Non-Classroom	Tournaments
STU	Programs: Non-Classroom	Track Meets
STU	Registers: Student Enrolment and Attendance	Continuing Education Registers
STU	Registers: Student Enrolment and Attendance	Daily Absence Reports
STU	Registers: Student Enrolment and Attendance	Heritage Language Program Registers
STU	Registers: Student Enrolment and Attendance	Student Attendance Registers
STU	Registers: Student Enrolment and Attendance	Student Enrolment Registers
STU	Registers: Student Marks	Mark Verification Sheets
STU	Registers: Student Marks	Student Marks
STU	Student Exchanges	Plans for Exchanges
STU	Student Exchanges	Student Exchange Reports
STU	Student Exchanges	Student Exchange Schedules
STU	Student Health Records	Health Information
STU	Student Health Records	Health Unit Information
STU	Student Health Records	Medical Information
STU	Student Meal Programs	Breakfast Programs
STU	Student Meal Programs	Lunch Programs
STU	Student Meal Programs	Milk Programs
STU	Student Records: Continuing Education	Continuing Education Student Marks
STU	Student Records: Continuing Education	Mature Student Appraisal
STU	Student Records: Co-op Programs	Apprenticeship Programs
STU	Student Records: Co-op Programs	Co-operative Work Assignments
STU	Student Records: Co-op Programs	Copies of Work Education Agreements
STU	Student Records: Co-op Programs	Employer Interview Evaluation Forms
STU	Student Records: Co-op Programs	Program Applications
STU	Student Records: Co-op Programs	Student Evaluation Forms
STU	Student Records: Co-op Programs	Training Plans

STU	Student Records: External Program Participation	Field Trips
STU	Student Records: International Students	Student Files
STU	Student Records: International Students	Medical Information
STU	Student Records: International Students	Home-stay/Contacts
STU	Student Records: Special Needs	Applications for Admission
STU	Student Records: Special Needs	Assessments
STU	Student Records: Special Needs	Individual Education Plans
STU	Student Records: Special Needs	Tests
STU	Student Registrations/Applications	Application Forms
STU	Student Registrations/Applications	Continuing Education Applications
STU	Student Registrations/Applications	French Immersion Applications
STU	Student Registrations/Applications	Registration Forms
STU	Student Registrations/Applications	Special Program Applications
STU	Student Registrations/Applications	Summer School Applications
STU	Student Reporting	Class Lists Reports
STU	Student Reporting	First Language Reports
STU	Student Reporting	Homeroom Lists
STU	Student Reporting	Non-resident Student Reports
STU	Student Reporting	Ontario Scholar Lists
STU	Student Reporting	Promotion Listings
STU	Student Reporting	Student Information Systems Reports
STU	Student Reporting	Student Online Transaction Listing
STU	Suspensions/Expulsions	Expulsion Notice
STU	Suspensions/Expulsions	Suspension Notice
STU	Timetables/Schedules	Course Timetables
STU	Timetables/Schedules	School Bell Schedule
STU	Timetables/Schedules	School Year Calendar
STU	Timetables/Schedules	Teacher's Day Book
STU	Timetables/Schedules	Teacher's Timetables
STU	Timetables/Schedules	Yard Duty
STU	Transfers/Exits/Admittances/Retirements	Admittances
STU	Transfers/Exits/Admittances/Retirements	Exits
STU	Transfers/Exits/Admittances/Retirements	Retirements
STU	Transfers/Exits/Admittances/Retirements	Transfers
STU	Transportation: Student Bus Services	Boundaries
STU	Transportation: Student Bus Services	Bus Routes
STU	Transportation: Student Bus Services	Bus Schedules
STU	Transportation: Student Bus Services	Requests for Transportation
STU	Transportation: Student Bus Services	Student Lists

STU	Visitor Logs	Staff
STU	Visitor Logs	Professional Services
STU	Visitor Logs	Public

Retention Schedule

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
ADM	Associations/ Organizations	Includes reports, newsletters, publications, conference and workshop information and proceedings from organizations to which staff belong	Originating Department	On-site – 1 year Off-site – 1 year Total Retention 2 years	Current School or Fiscal Year						Operational Value
ADM	Audio-Visual Services	Includes all records pertaining to bookings, distributions, copying and cataloguing.	Originating Department	On-site – 1 year Off-site – 1 year Total Retention 2 years	Current School or Fiscal Year						Operational Value
ADM	Forms Inventory	Includes blank copies of forms, kept on file for convenience.	Originating Department	Superseded + 1 year	Current School or Fiscal Year					Superseded=when new forms are created	Operational Value
ADM	Library Management	Includes records related to board/school library operations. Records include collection inventories, correspondence, acquisition and disposal planning and strategies, and other records related to library holdings and operations.	Library Services	Superseded + 1 year	Current School or Fiscal Year		yes			Superseded=when inventories are updated and library weeding out is completed.	MFIPPA Operational Value

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
ADM	Meeting Documentation Internal	Includes records regarding staff meetings, student council and committees such as school council, secretaries' meetings, as well as district and subject head meetings. Records include agendas, minutes, reports and resolutions.	Originating Department	On-site 1 year Off-site 3 years Total Retention 4 years	Current School or Fiscal Year			yes			Operational Value
ADM	Meeting Documentation External	Includes records of external committees and councils on which board and school staff members participate as members. Records include agendas, reports, resolutions and any documentation which reflects obligations of the board.	Originating Department	On-site 1 year Off-site 2 years Total Retention 3 years	Current School or Fiscal Year						Operational Value
ADM	Policing Arrangement	Includes correspondence between schools and police departments regarding extra duty officers, police visits to schools, and related items.	Originating Department	On-site 1 year Off-site 4 years Total Retention 5 years	Current School or Fiscal Year						Operational Value

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
ADM	Records Destruction Notices	Documentation relating to which records have been destroyed in the normal course of business. This includes lists of destroyed records and forms authorizing the destruction of records.	Current site/school	Permanent	Current School or Fiscal Year	yes				Evidence of application of records program to support litigation if required.	Legal Value
ADM	Records Management and Listing Reports	Includes information regarding the management of records, regardless of medium. Records include Classification Scheme, file lists, lists of records in storage, records management reports and related correspondence.	Freedom of Information Officer	Superseded + 1 year	Current School or Fiscal Year	yes				Superseded = when new reports are received	Legal Value
ADM	Requests for Information	Includes requests and tracking sheets for Freedom of Information Requests made under the Municipal Freedom of Information and Protection of Privacy Act and requests for access to student/employee records and information.	Freedom of Information Officer	Event + 2 years	Current School or Fiscal Year		yes			Event = final resolution of request or appeal if applicable	Legal and operational value

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
ADM	Service Requisitions and Reports	Includes records relating to translation, duplicating/ printing services and mail/courier and delivery services. Records include requisitions and memos for services, confirmations and service logs/reports, correspondence, reports.	Originating Department	On-site 1 year Off-site 1 year Total Retention 2 years	Current School or Fiscal Year						Operational Value
ADM	Vendors Suppliers Contractors	Includes information about vendors, contractors and suppliers and their goods and services. Records include catalogues, price lists and correspondence. This excludes agreements and purchasing documentation.	Originating Department	Superseded + 1year	Current School or Fiscal Year					Superseded = when new documentation is received from suppliers	Operational Value
COM	Advertisements	Includes publications, artwork and copies of advertisements placed by the board or schools.	Originating Department	On-site 1 year Off-site 3 years Total Retention 4 years	Current School or Fiscal Year			yes			Operational Value
COM	Appreciation and Commendations	Includes general commendations, certificates of appreciation and petitions received from the general public and parents.	Originating Department	Current + 1 year	Current School or Fiscal Year						

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
COM	Communication	Includes memos, brochures, correspondence and related information about programs and activities sponsored by the board or by schools.	Originating Department	Superseded + 1 year	Current School or Fiscal Year			yes		Superseded = when new correspondence is created	Operational Value
COM	Complaints	Includes records related to general complaints about the board/ schools and its activities. Includes correspondence, investigations, findings and related reports regarding resolution. Complaints about a specific project or program may be contained within the program. Excludes complaints specific to an individual student or staff member – see case files.	Originating Department	Event + 1 year	Current School or Fiscal Year		yes			Event = Resolution of complaint	Municipal Freedom of Information and Protection of Privacy Act
COM	Contacts and Mail Listings	Includes lists of individuals or organizations with whom the board and school communicate. Records include mailing lists, emergency contact lists, student lists.	Originating Department	Superseded	Current School or Fiscal Year		yes			Superseded = when new lists are updated	Municipal Freedom of Information and Protection of Privacy Act Operational Value

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
COM	Events, Ceremonies, and Celebrations	Includes memos, notices, correspondence with parents and others, programs and all related materials pertinent to events sponsored by the board or by schools (e.g., parents' night, school opening ceremonies, reunions, etc.). Records include program schedules, correspondence, brochures, and event activity details.	Originating Department	On-site 1 year Off-site 3 years Total Retention 4 years	Current School or Fiscal Year			yes			Operational Value
COM	Media Relations, Communications and News Releases	Includes records regarding board relations with the various media. Includes press releases and information releases, speeches, photographs, correspondence.	Originating Department	On-site 1 year Off-site 3 years Total Retention 4 years	Current School or Fiscal Year			yes			Operational Value
COM	Memorabilia	Includes school/board memorabilia, collectibles and other historical items that reflect the individual nature of the schools, such as informal school and board histories, school logos and crests, songs.	Originating Department	Permanent				yes		The Board does not maintain a separate historical collection and will deem items listed as permanent retention.	Education Act Historical Value

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
COM	Multimedia Materials	Includes photographs, slides, videotapes, CDs, DVDs, recordings, etc. that document school and board activities.	Originating Department	Permanent				yes		The Board does not maintain a separate historical collection and will deem items listed as permanent retention.	Education Act Historical Value
COM	News Reports	Includes news reports from newspapers, magazines, websites and other publications regarding the board and school, staff, students and trustees.	Originating Department	Permanent	Current School or Fiscal Year			yes		The Board does not maintain a separate historical collection and will deem items listed as permanent retention.	Education Act Historical Value
COM	Publications Internal	Includes records and artwork for publications such as yearbooks, curriculum handbooks, school handbooks, school calendars, "Welcome to High School" booklets, annual reports, brochures on programs offered by schools, newsletters, and other school promotions.	Originating Department	Permanent	Current School or Fiscal Year		yes	yes		The Board does not maintain a separate historical collection and will deem items listed as permanent retention.	Municipal Freedom of Information and Protection of Privacy Act Education Act Historical Value
COM	Speeches and Presentations	Includes speeches and presentations delivered by board and school staff, elected officials and teachers covering non-classroom topics.	Originating Department	Permanent	Current School or Fiscal Year			yes		The Board does not maintain a separate historical collection and will deem items listed as permanent retention.	Education Act Historical Value

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
COM	Websites	Includes snapshots of website content and copies of web pages created by school boards for general public use. Includes board and school sites	Originating Department	Permanent	Current School or Fiscal Year			yes		The Board does not maintain a separate historical collection and will deem items listed as permanent retention.	Education Act Historical Value Operational Value
FAC	Audio Visual Services	Includes records pertaining to equipment repair	Originating Department	On-site 1 year Off-site 1 year Total Retention 2 years	Current School or Fiscal Year						Operational Value
FAC	Building and Site Approvals	Includes documentation such as site plan approvals, building permits, Life Safety Plan and municipal reports pertaining to the approval of building plans by the municipality, Fire Marshal's Office, Ministry of Education, Ministry of Health, and other government bodies	Facilities	Event + 6 years	Current School or Fiscal Year					Event = as long as building remains board property.	Building Code Act Fire Protection and Prevention Act Technical Standards and Safety Act Operational Value Legal Value

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
FAC	Confined Spaces	Includes records relating to the assessment of confined spaces and written plan and procedures for the control of hazards in confined spaces.	Facilities	Superseded + 1 year	Current School or Fiscal Year					Superseded = when the record was first created. Retain until new procedures replace the current one.	Occupational Health and Safety Act
FAC	Designated Substance and Hazardous Material Monitoring: Hazardous, Biological, Chemical or Physical Agents	Includes records regarding the monitoring of hazardous chemical and physical agents and designated substances in accordance with the Occupational Health and Safety Act. Includes air quality reports. Excludes exposure records of workers.	Facilities	On-site 1 year Off-site 4 years Total Retention 5 years	Current School or Fiscal Year						Occupational Health and Safety Act
FAC	Designated Substance and Hazardous Materials, Waste monitoring and Management:	Includes records related to the management and disposal of chemical, biological or physical agents or substances.	Facilities	On-site 1 year Off-site 3 years Total Retention 4 years	Current School or Fiscal Year						Occupational Health and Safety Act Operational Value

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
FAC	Drawings and Specifications	Includes technical specifications for a project or property, e.g., mechanical, electrical and structural. Includes building and fire code requirements and architect's instructions. Includes all drawings and plans of schools and offices, such as master drawings and floor plans, site plans, aerial plans, and plans for additions and alterations.	Facilities	Event + 15 years	Current School or Fiscal Year	yes		yes		Event = as long as the building remains board property.	Real Property Limitations Act
FAC	Emergency Plans	Includes records regarding emergencies and related plans to support the board, school in case of fire or emergencies. Records include emergency plans, business continuity plans, call lists, supplier/vendor contacts, and related reports	Facilities and Schools	Superseded + 5 years	Current School or Fiscal Year	yes		yes		Superseded = when old plans are replaced with new plans.	Operational Value

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
FAC	Facilities and Construction Projects	Includes budgets, estimates, project plans and schedules, progress reports, project meeting minutes, certificates of clearance, project drawings and correspondence regarding the building of schools and other properties .	Facilities	Event + 6 years	Current School or Fiscal Year					Event = upon completion of the project.	Building code Act Fire Protection and Prevention Act Technical Standards and Safety Act
FAC	Facilities Planning	Includes records regarding the allocation of classroom and workspace to staff and students. Records include correspondence, proposed enrolment studies and reports, facilities use plans, facilities designs and layouts, furniture layouts.	Facilities	On-site 1 year Off-site 4 years Total Retention 5 years	Current School or Fiscal Year						Operational Value

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
FAC	Inspection and Testing Log Reports	Includes all documentation to support the inspection and testing of buildings, equipment, physical plant and property. Records include logs, inspection reports, year-end reports, equipment lists and locations. Includes water flushing logs, water testing reports, elevator logs, sanding and salting logs, playground equipment inspections logs, chemical treatment log, underground storage tank inspections, playground inspections, physical education equipment inspections, technical program equipment, etc.	Facilities	Event + 6 years	Current School or Fiscal Year					Event = date of inspection or test. Ensure that at least current and preceding reports are retained.	Fire Protection and Prevention Act Safe Drinking Water Act Technical Standards and Safety Act
FAC	Inspection Logs and Reports: Fire Protection Equipment and Emergency Power Systems	Includes records regarding the inspection and testing of emergency power systems, fire extinguishers and fire protection systems.	Facilities	Event + 2 years	Current School or Fiscal Year					Event = the date the equipment was purchased	Fire Protection and Prevention Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
FAC	Land Surveys	Includes land survey information such as legal property surveys, construction layout and control surveys, and field notes. Also includes soil-boring reports.	Facilities	Superseded - Permanent	Current School or Fiscal Year			yes		Superseded = keep until a new version replaces the old one. Note: Ensure land surveys are available at the local registry office before destruction	Operational Value
FAC	Maintenance and Operations: Buildings, Physical Plant, Equipment	Includes records related to support the maintenance and operations of buildings, physical plant and equipment.	Facilities	Event + 3 years	Current School or Fiscal Year					Event = the disposal of the property or equipment.	Fire Protection and Prevention Act Technical Standards and Safety Act
FAC	Maintenance and Operations: Grounds	Maintenance requisitions, work orders, logs and reports showing action taken re: grounds keeping, snow clearance, and cleaning.	Facilities	On-site 1 year Off-site 2 years Total Retention 3 years	Current School or Fiscal Year						Operational Value

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
FAC	Material Safety Data Sheets	Includes material safety data sheets as created and issued by the manufacturer.	Facilities Originating Department	Event + 3 years	Current School or Fiscal Year					E = creation or revision of the MSDS. Note: Every location that uses the material must retain a copy of the data sheet.	Occupational Health and Safety Act
FAC	Permits/Facility Bookings	Includes copies of permits issued by the board for the use of school property for purposes such as polling stations and community events. Also includes applications for permits, lists of permit holders and inter-jurisdictional permits.	Originating Department	On-site 1 year Off-site 4 years Total Retention 5 years	Current School or Fiscal Year					Operational Value	Operational Value
FAC	Security	Includes records regarding the security of office and school facilities and properties such as control of keys, trespassing, surveillance reports, emergency telephone numbers/contacts, and police station locations. Also includes school visitor book and contractor logs, etc.	Facilities Originating Department	Superseded + 2 years	Current School or Fiscal Year		yes			Superseded = retain until a new version replaces the old one.	Education Act Municipal Freedom of Information and Protection of Privacy Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
FAC	Vehicles/Fleet Management	Includes records of all vehicles currently owned, operated and maintained by the board.	Facilities	Event + 2 years	Current School or Fiscal Year					Event = disposal of vehicle	Compulsory Automobile Insurance Act Limitations Act
FIN	Accounts Payable	Includes records documenting funds payable such as legal fees, trustees and employees' expenses, vendor transaction listings, payment vouchers, cheque requisitions, gas, hydro and phone bills, petty cash disbursements. Staff and board expenses.	Finance	On-site 2 years Off-site 5 years Total Retention 7 years	Current School or Fiscal Year		yes			Please note may contain Personal Information	Excise Tax Act Income Tax Act-R.S.O. Income Tax Act-R.S.C. Electronic Commerce Act Municipal Freedom of Information and Protection of Privacy Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
FIN	Accounts Receivable	Records related to the accounting for money owed to schools and boards. Records include invoices, cash receipts, correspondence, cash lists and statements of account.	Finance	On-site 2 years Off-site 5 years Total Retention 7 years	Current School or Fiscal Year	yes					Excise Tax Act Income Tax Act-R.S.O. Income Tax Act-R.S.C. Electronic Commerce Act
FIN	Articles of Incorporation, By-law and Constitution	Includes records related to the operation of the school board and capture details about the legal entity. Audits: Program: Includes audits of programs, curriculum plans and related board and school activities undertaken by the Ministry of Education.	Finance	Permanent Retention	Current School or Fiscal Year						Education Act Business Commerce Act
FIN	Audits Financial	Includes records regarding internal and external financial audits of accounts.	Finance	On-site 2 years Off-site 5 years Total Retention 7 years	Current School or Fiscal Year	yes					Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
FIN	Banking and Cash Management	Includes records regarding banking transactions and relationships with banks. Includes bank statements, bank reconciliations, deposit records, cancelled cheques, cheque stubs and money order rates.	Finance	On-site 2 years Off-site 5 years Total Retention 7 years	Current School or Fiscal Year	yes					Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act
FIN	Budgets	Includes departmental and board budgets, both capital and operating. Includes all working notes, budget formula calculations, current estimate highlights, preliminary formula budget calculation sheet summaries, and budgeted vs. actual reports.	Finance	On-site 2 years Off-site 5 years Total Retention 7 years	Current School or Fiscal Year						Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
FIN	Capital Projects Financing	Includes records relating to the financing of capital projects. Includes quarterly reports, working papers, building monthly costs, capital payment vouchers, approvals, costing, capital expenditure forecasts and correspondence with architects and contractors.	Finance	On-site Event + 1 year Off-site 5 years Total Retention 6 years	Current School or Fiscal Year					Event = Completion of project	Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act
FIN	Capital Revenue	Includes records related to capital revenue from sale of property and rental income from leased premises and other sources.	Finance	On-site 2 years Off-site 5 years Total Retention 7 years	Current School or Fiscal Year	yes					Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
FIN	Financial Forecasts and Reports	Includes records relating to general ledger balancing, including GL reports, variance reports, yearly schedule, and variance report changes.	Finance	On-site 2 years Off-site 5 years Total Retention 7 years	Current School or Fiscal Year						Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act
FIN	Financial Statements	Includes the balance sheet, income statement, statement of source and application of funds, and other audited financial statements.	Finance	On-site 2 years Off-site Retain for the life of the Board Total Retention Permanent	Current School or Fiscal Year	yes					Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act
FIN	Financial Work Papers	Includes all drafts, grant calculations and other working papers associated with the development of financial statements.	Finance	On-site 2 years Off-site 5 years Total Retention 7 years	Current School or Fiscal Year						Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
FIN	Funding Assessments	Includes records relating to the direction of school support, levies and related assessments. Also includes information on fee-paying, non-resident and international visa students.	Finance	On-site 2 years Off-site 5 years Total Retention 7 years	Current School or Fiscal Year						Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act
FIN	Funding: External Sources	Records relate to bequests and donations, grants and subsidies (including government), and Intensive Support Amount (ISA) claims, Foundation. Records include correspondence, background information and supporting documentation.	Finance	On-site event + 1 year Off-site 5 years Total retention 7 years	Current School or Fiscal Year	yes				Event = the date the funds ended.	Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act
FIN	Funding: School/Parent Councils	Includes records on funds allocated to or raised by the school/parent council. Records consist of accounts receivable and payable documents such as invoices and vouchers	Originating Department	On-site 2 years Off-site 5 years Total retention 7 years	Current School or Fiscal Year	yes					Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
FIN	Funding: Student Generated 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.	Originating Department	On-site 2 years Off-site 5 years Total retention 7 years	Current School or Fiscal Year	yes					Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act
FIN	Funding: Charitable Organizations	Includes records regarding the raising of funds for charitable organizations. Records include completed contribution forms, promotional materials for fundraising and reports.	Originating Department	On-site 2 years Off-site 5 years Total retention 7 years	Current School or Fiscal Year	yes					Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act
FIN	Income Tax Returns	Records relating to federal and provincial income tax returns, including signed income tax returns and supporting documents submitted to federal and provincial tax agencies.	Finance	On-site 3 years Off-site retain permanently	Current School or Fiscal Year						Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
FIN	Insurance Policies	Records relating to policies to cover loss or damage to property or premises and cover staff and general public against injury or death resulting from accidents on school/board premises or occurring during employment. Records include insurance policies, documentation regarding the annual review of insurance policies, certificates, appraisals and related correspondence.	Finance	Permanent	Current School or Fiscal Year					Superseded = retain until a new version replaces the old one	Limitations Act
FIN	Inventory Control: Fixed Assets	Fixed Assets: Records relating to the balance sheet, including fixed asset listings, depreciation details, asset transfer information, and details of extraordinary entries.	Finance	On-site Event + 1 year Off-site Permanently Total retention Permanent	Current School or Fiscal Year	yes				Event = disposal of asset	Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
FIN	Inventory Control: Non-Fixed Assets	Includes all records regarding inventories of board-owned equipment.	Finance	On-site 2 years Off-site 5 years Total retention 7 years	Current School or Fiscal Year						Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act
FIN	Investments	Includes records regarding the board's investments, term deposits and promissory notes. May also include records of investments in fuel for later sale to individual schools and other organizations involved in the bulk purchase. Includes records regarding the debentures and bonds issued.	Finance	On-site event + 1 year Off-site 5 years Total retention 7 years	Current School or Fiscal Year	yes				Event = after closure of account, redemption of issue.	Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
FIN	Journal, Vouchers and Entries	Includes completed journal voucher forms, input forms, and all background documentation used to substantiate journal entries.	Finance	On-site 2 years Off-site 5 years Total retention 7 years	Current School or Fiscal Year						Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act
FIN	Ledgers: General	Includes all records in the books of original entry, whether maintained in book format or as a computer report.	Finance	Current + 2 years Off-site Permanent Retain for the life of the board	Current School or Fiscal Year	yes				Current = retain for the school or fiscal year	Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
FIN	Ledgers: Subsidiary and Journals	Includes all subsidiary ledgers, registers and journals such as payment and receipt journals, payroll registers, purchase order registers, and year-end adjustments.	Finance	On-site 2 years Off-site 5 years Total retention 7 years	Current School or Fiscal Year						Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act Limitations Act Real Property Limitations Act
FIN	Payroll Management	Includes all records of payments of salary, wages and deductions to employees. Includes payroll master cards, time sheets, direct deposit request forms, payroll update logs, holdbacks, and payroll deduction and billing reports. Also includes T4's, TD's, and ROE's.	Finance	On-site 2 years Off-site 5 years Total retention 7 years	Current School or Fiscal year	yes					Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
FIN	Pension Contributions and Support	Includes contribution cards detailing pension and benefits obligations due to retired employees under OMERS and other annuity or superannuation plans (TPP). Includes payroll records required to determine and verify pension payments.	Finance	On-site event + 1 year Off-site 5 years	Current School or Fiscal Year	yes				Event = until pension is paid out to all beneficiaries	Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act
FIN	Pension Plans	Includes general information on OMERS, TPP and other annuity or superannuation plans and annual information returns.	Finance	Superseded Retain for the life of the board	Current School or Fiscal Year					Superseded = retain until a new version replaces the current one.	Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
FIN	Purchasing Documentation	Records supporting purchases made by the school/board. Includes purchase requisitions, purchase orders, requests for proposal, requests for quotations, specifications, invitations to tender, proposals, tender submissions, bid and performance bonds, and all documentation regarding the selection process.	Finance	On-site 2 years Off-site 5 years Total retention 7 years	Current School or Fiscal Year	yes					Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act
FIN	Sales and Property Tax Return Reports	Includes records documenting taxation such as gas surtax reports, income tax returns, and federal sales tax tables. Also includes Harmonized Sales Tax returns and requests for rebate.	Finance	On-site 2 years Off-site 5 years Total retention 7 years	Current School or Fiscal Year						Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
FIN	Transportation Reports and Costing	Includes records on bus route costing, fuel rates, bus capacity loading, and records regarding the escalation and de-escalation of fuel prices for vehicles and buses and its impact on the Bus Transportation Contract with the Bus Line Operators.	Originating Department	On-site 2 years Off-site 5 years Total retention 7 years	Current School or Fiscal Year						Excise Tax Act Income Tax Act-R.S.C. Income Tax Act-R.S.O. Electronic Commerce Act
GOV	Appointments: Board and Committee	Includes records on recommendations made by the board regarding appointments to other local boards such as the library board, board solicitors, banking authority and auditor.	Board Secretary	Event + 1 year	Current School or Fiscal Year			yes		Event = expiry of term of office	Education Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
GOV	Audits: Programs	Includes audits of programs, curriculum plans, and related board and school activities undertaken by the Ministry of Education.	Originating Department	On-site 2 years Off-site 5 years Total Retention 7 years	Current School or Fiscal Year						Education Act
GOV	Guidelines, Policies and Directives: External	Includes documentation about initiatives and guidelines provided by the Ministry of Education. Records include memoranda, directives, and correspondence such as the OSR Guideline, Safe Schools Guidelines and Ministry Policy/Program Memoranda.	Board Secretary	Superseded + 3 years	Current School or Fiscal Year					Superseded = when policies and directives are replaced. Board/school can obtain old copies from Ministry if required	Education Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
GOV	Guidelines, Policies and Directives: Internal	Includes records relating to board and school operating practices and activities, policy and procedure manuals, guidelines and directives, and all other policies and procedures established by the board, departments and schools, such as accounting procedures, emergency procedures, evaluation procedures, records management, personnel, and attendance reporting procedures.	Originating Department	On-site superseded + 1 year Off-site retain permanently	Current School or Fiscal Year			yes		Superseded = when policies and procedures are replaced. Core records show evolution of school/board	Education Act Occupational Health and Safety Act Fire Protection and Prevention Act Excise Tax Act
GOV	Intergovernmental Reporting and Communication	Includes correspondence and reports between the board and various levels of government such as the municipality, provincial ministries, etc. Also includes correspondence and information on other school boards.	Originating Department	On-site 2 years Off-site 5 years Total Retention 7 years	Current School or Fiscal Year			yes			Education Act
GOV	Meetings: Board of Trustees	Includes agenda and related reports for meetings, working notes used in agenda preparation, minutes, resolutions and briefs.	Board Secretary	On-site 5 years Off-site-Permanent Retention	Current School or Fiscal Year			yes			Education Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
GOV	Meetings: Governance Committees and Councils	Includes agenda and minutes of school standing, advisory and ad hoc committees. May include, administrative council, directors' council; steering, standing, and advisory committees; task forces; the Employee Assistance Program advisory committee; and Special Education advisory committee, the Safe Schools Committee.	Board Secretary	On-site 5 years Off-site-Permanent Retention	Current School or Fiscal Year			yes			Education Act
GOV	Meetings: School Council	Includes agenda and minutes of meetings.	Principal	On-site 2 years Off-site 5 years Total Retention: 7 years	Current School or Fiscal Year						Education Act
GOV	Organization Structure	Includes records regarding reporting relationships, organization structure, organization analysis, etc. For both schools and school boards. Includes organizational charts and school profiles.	Originating Departments	Superseded + 4 years	Current School or Fiscal Year			yes		Superseded = when organization structure changes.	Education Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
GOV	Strategic Planning Documents	Includes all strategic and operational planning documents, and mandates, as well as related correspondence and background and reference information.	Originating Department	Superseded + 2 years Permanent Retention of the strategic planning document	Current School or Fiscal Year					Superseded = retain until a new version replaces the old one Permanent Retention of the strategic planning document	Operational Value
GOV	Trustee Management	Includes clerk's certificate, elections information, personal information, directories and news items regarding the trustees. Also includes trustees' distribution and orientation information.	Board Secretary	Event + 2 years	Current School or Fiscal Year		yes	yes		Event = expiry of term of office	Education Act Municipal Freedom of Information and Protection of Privacy Act Municipal Elections Act
HUM	Attendance Employees	Includes records regarding employee attendance, absences (leaves and sabbaticals) and vacations. Records include details about vacation schedules, hours of work, absenteeism reports and related reports from the Human Resource Information Systems.	Human Resources	Event + 3 years	Current School or Fiscal Year		yes			Event = date record was created	Municipal Freedom of Information and Protection of Privacy Act Employment Standards Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
HUM	Criminal Background Checks and Declarations	Includes records listing any criminal code convictions that have not been pardoned for all existing and new employees, service providers and volunteers that come into direct contact with students on a regular basis. Includes annual offence declaration.	Human Resources	Event + 10 years	Current School or Fiscal Year		yes			Event = termination of employment or six years without an offence declaration for volunteers.	Municipal Freedom of Information and Protection of Privacy Act Education Act
HUM	Criminal Background Checks and Declarations: Volunteers	Includes records listing any criminal code convictions that have not been pardoned for all existing and new service providers and volunteers that come into direct contact with students on a regular basis. Includes annual offence declaration.	School	Background Checks: Event + 6 years Declarations: Superseded + 1 year	Current School or Fiscal Year		yes			Superseded = retain until a new version replaces the current one.	Municipal Freedom of Information and Protection of Privacy Act Education Act
HUM	Employee Benefit Plan	Includes brochures, rates, quotes, correspondence and explanatory documents regarding benefits offered to employees such as group insurance, dental plans, benefit rate changes and premium adjustments.	Human Resources	Superseded + 1 years	Current School or Fiscal Year					Superseded = retain until a new version replaces the current one. Operational Value	Operational Value

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
HUM	Employee Claims	Includes records pertaining to long-term and short-term disability.	Human Resources	Event + 10 years	Current School or Fiscal Year		yes			Event = when claim is settled	<p>Limitations Act</p> <p>Municipal Freedom of Information and Protection of Privacy Act</p> <p>Occupational Health and Safety Act</p> <p>Workplace Safety and</p>
HUM	Employee Incident and Accident Reports	Includes reports of accident/injury to board employees under the Workplace Safety and Insurance Act and designated substances exposure records under the Occupational Health and Safety Act. Records may include: doctor's notes, follow-up notes and related correspondence, and short-term and long-term disability claims for both teaching and support staff and record of administration of first aid.	Human Resources	Event + 10 years	Current School or Fiscal Year		yes			<p>Event = when claim is settled</p> <p>Note: if it is believed that the event might reoccur past 7 years retain until retirement + 7 years</p>	<p>Limitations Act</p> <p>Municipal Freedom of Information and Protection of Privacy Act</p> <p>Occupational Health and Safety Act</p> <p>Workplace Safety and Insurance Act</p>

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
HUM	Employee Records	Includes records regarding the employment history of the board or school employees. Includes initial resume and applications, internal applications, benefit enrollment forms, salary calculation forms, change advice, employee master record cards, certification of level placement, probationary contract, key tasks, and employee verification forms. Includes teaching and support staff.	Human Resources	Event + 10 years	Current School or Fiscal Year	yes	yes			Event = termination of employment	<p>Limitations Act</p> <p>Municipal Freedom of Information and Protection of Privacy Act</p> <p>Occupational Health and Safety Act</p> <p>Workplace Safety and Insurance Act</p>
HUM	Employee Surveys	Includes surveys and research conducted on board staff regarding issues and planning that affect them.	Human Resources	Superseded + 1 year	Current School or Fiscal Year		yes			Superseded = when survey is updated	Municipal Freedom of Information and Protection of Privacy Act
HUM	Employment Equity Program	Includes records and historical information regarding employment equity.	Human Resources	Event + 3 years	Current School or Fiscal Year		yes	yes		Event = termination of the plan	Municipal Freedom of Information and Protection of Privacy Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
HUM	Health and Wellness	Includes records pertaining to the employee assistance program and accommodations.	Human Resources	Event + 10 years	Current School or Fiscal Year		yes			Event = once the assistance and accommodations are settled	Limitations Act Municipal Freedom of Information and Protection of Privacy Act Occupational Health and Safety Act Workplace Safety and Insurance Act_

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
HUM	Health and Safety Committee	Records include reports, correspondence, minutes of health and safety committee meetings, notices, correspondence and reports.	School/Site	Event + 3 years			yes				Occupational Health and Safety Act Legal Value
HUM	Human Resources Planning	Includes records of succession planning, staff allocations, staff turnover, staff mobility, promotions, transfers and related records.	Human Resources	On-site 2 years Off-site 5 years Total retention 7 years	Current School or Fiscal Year		yes				Municipal Freedom of Information and Protection of Privacy Act
HUM	Incident Reports: Health and Safety:	Includes general records relating to incidents that affect health and safety of staff, e.g., emergency response, school illness, infections, quarantines, etc. Records include reports, correspondence and summaries and information related to actions	Human Resources	Event + 6 years	Current School or Fiscal Year					Event = Resolution of issue.	Occupational Health and Safety Act Education Act
HUM	Job Descriptions	Includes job descriptions and specifications as well as background information used in their preparation or amendment. Also includes positions of responsibility.	Human Resources	Superseded + 2 years	Current School or Fiscal Year		yes	yes		Superseded = when new job descriptions are created.	Operational Value

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
HUM	Labour Relations	Includes records regarding the administration and interpretation of the board's collective agreements and includes seniority lists, implementation plans, sub plans, and related records. Also includes records related to collective bargaining, e.g., final offers, memoranda of settlement, mediations, arbitrations, and scatter grams used in preparation for bargaining. Also includes records regarding grievances filed by employees, such as evaluation reports, notifications, correspondence with unions concerning grievance initiators, and legal opinions. Excludes collective agreement.	Human Resources	Event + 10 years	Current School or Fiscal Year					Event = termination of contract period; seniority lists until suspended.	Operational Value

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
HUM	Labour Relations: Employee Relations	Includes records regarding employee misconduct, investigations, notes correspondence, discipline and counseling	Human Resource	Event + 10 years	Current School or Fiscal Year		yes			Event = once resolution of the event is completed	Limitations Act Municipal Freedom of Information and Protection of Privacy Act
HUM	Labour Relations: Union Certification	Includes original documents concerning the certification of labour unions.	Human Resource	Permanent Retention	Current School or Fiscal Year						Legal Value
HUM	Medical Records: Employee	Includes doctor's notes, correspondence, and health reports related to an employee's medical situation.	Human Resource	Event + 1 year	Current School or Fiscal Year		yes			Event = once an event or action occurs. Note: Maintain confidentiality and limit access	Municipal Freedom of Information and Protection of Privacy Act
HUM	Medical Records: Employee Hazardous Material Exposure	Records of exposure to asbestos and other hazardous materials.	Human Resource	Event + 20 years	Current School or Fiscal Year		yes			Event = last record made	Municipal Freedom of Information and Protection of Privacy Act Occupational Health and Safety Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
HUM	Pay Equity	Includes records regarding the establishment and implementation of the board's pay equity plan. Records include background information, consultant information, questionnaires, interview documentation and job evaluation plans.	Human Resource	Superseded + 5 years	Current School or Fiscal Year					Superseded = retain until a new version replaces the current one	Operational Value
HUM	Performance Appraisals	Includes records of job performance appraisals on all employees according to established timelines and criteria through board procedures.	Human Resources	Event + 10 years	Current School or Fiscal Year		yes			Event = date of appraisal	Municipal Freedom of Information and Protection of Privacy Act <u>Education Act</u>
HUM	Professional Development Participation	Includes records relating to invitations, approvals and registrations for internal and external training events, seminars and workshops.	Human Resources	Current + 1 year	Current School or Fiscal Year					Current = retain for the current school or fiscal year	Municipal Freedom of Information and Protection of Privacy Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
HUM	Professional Development Programs and Materials	Includes records regarding courses and conferences facilitated by the board for staff development and information on career and professional development programs. Also includes conference proceedings and presentations, orientation materials and staff development calendars.	Human Resources	On-site 2 years Off-site 3 years Total retention 5 years	Current School or Fiscal Year			yes			Operational Value
HUM	Recruitment and Hiring	Includes records regarding the recruitment of staff. Includes job postings, copies of advertisements, competitions and resumes of candidates selected for interviews.	Human Resources	Event + 1 year	Current School or Fiscal Year					Event = date of posting Note: Only retain files for people interviewed	Operational Value
HUM	Resume and Job Applications	Records include applications, resumes and applicant evaluations to support recruitment in the school and school board. Excludes resumes of candidates selected to be interviewed.	Human Resources	Event + 6 months	Current School or Fiscal Year		yes			Event = decision regarding hiring or not. Resume is transferred to employee file upon hiring.	Municipal Freedom of Information and Protection of Privacy Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
HUM	Salary Administration	Includes records regarding the planning and scheduling of salaries, such as job evaluations, job classification systems, salary surveys and schedules, salary increments, service pay and substitution pay.	Human Resources	Superseded + 1 year	Current School or Fiscal Year					Superseded = retain until a new version replaces the old one	Operational Value
HUM	Staff Awards, Certificates and Bursaries	Includes records relating to special recognition and awards presented to staff.	Human Resources	Current + 2 years	Current School or Fiscal Year		yes			Current = retain for the current school or fiscal year Subject to inclusion in employee records	Municipal Freedom of Information and Protection of Privacy Act
HUM	Staff Listings and Directories	Records includes listing of supply teachers, retirement lists, seniority lists and staff listing	Human Resources	Superseded + 1 year	Current School or Fiscal Year	yes	yes			Superseded = retain until a new version replaces the current one	Municipal Freedom of Information and Protection of Privacy Act
HUM	Temporary Resourcing	Includes correspondence, requests for temporary help, lists of floater secretaries/supply teachers, etc.	Human Resources	Superseded + 1 year	Current School or Fiscal Year	yes	yes			Superseded = retain until a new version replaces the current one	Municipal Freedom of Information and Protection of Privacy Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
HUM	Training - Legislated	Includes records related to staff training mandated by legislation or board policy including confined space general and specific training, WHMIS training, etc.	Human Resources	Superseded + 4 years	Current School or Fiscal Year		yes			Superseded = retain until a new version replaces the current one Subject to inclusion in employee records	Operational Value Municipal Freedom of Information and Protection of Privacy Act
HUM	Training – non legislated	Includes records related to staff training which are not mandated by legislation but documented. These records may include behavior management training, internal staff training etc.	Human Resources	Event + 4 years	Current School or Fiscal Year		yes			Event = once the event or action occurred Subject to inclusion in employee records	Operational Value Municipal Freedom of Information and Protection of Privacy Act
HUM	Volunteers	Includes records of volunteer programs such as recruitment workshops, annual receptions and volunteer activities in schools. Records include volunteer guidelines, correspondence, and volunteer program details.	Schools	Superseded + 1 year	Current School or Fiscal Year			yes		Superseded = retain until a new version replaces the current one	Municipal Freedom of Information and Protection of Privacy Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
ICT	Access Controls and Password Records	Records related to the management of and access to programs. Also includes individual access, password management.	ICT	Event + 1 year	Current School or Fiscal Year		yes			Event = termination of employee	Operational Value
ICT	Computer System Design and Architecture	Records relating to the design of computer systems and/or software, including needs assessments, business cases, process flowchart documentation, user and system requirements, specifications, testing plans and results, user sign-offs, project management meeting minutes/documentation, system development documentation, software design records, and software inspection notes. Also includes records on system installations/conversions and product evaluations. Also includes requests for significant modification, fixes and upgrades.	ICT	Event + 2 years	Current School or Fiscal Year					Event = life of the system	Operational Value

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
ICT	Information Systems Production Activity and Control Files	Records relating to computer system operations and backup information. Also includes activity logs, trouble tickets, change control sheets, change orders, file access control reports, system changes, and mainframe access forms.	ICT	Superseded + 1 year	Current School or Fiscal Year					Superseded = retain until a new version replaces the old one	Operational Value
ICT	OnSIS Reporting	Includes all counts and projections documenting enrolments in the school system and statistical reports required by the Ministry of Education as part of the funding process for the preparation of educational statistics.	Finance	On-site 2 years Off-site 5 years Total retention 7 years	Current School or Fiscal Year			yes			Operational Value Legal Value
ICT	Telecommunications Systems	Records relating to the management and maintenance and use of telecommunications equipment. Also includes system documentation, configuration details and services provided.	ICT	Event + 3 years	Current School or Fiscal Year					Event = life of the system	Operational Value

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
LEG	Accident / Incident Claims and Reports	Includes reports related to student accidents that occur on board property, schools and the administration offices or on school trips. Records include claims, communications, investigations, reports, administration of first aid and action taken as a result of the accident. Includes reports to Ontario School Board Insurance Exchange. Excludes claims/litigations, WSIB claims/reports.		Event + 3 years	Current School or Fiscal Year		yes			Event = once the accident/incident has been resolved. If applies to student, keep until student is age 18	Municipal Freedom of Information and Protection of Privacy Act
LEG	Acts and Legislation	Includes single copies of Acts and Regulations, bills and judgments relevant to the board's activities, as well as correspondence and discussion papers concerning the Acts and Regulations and amendments to them.		Superseded + 1 year	Current School or Fiscal Year					Superseded = retain until a new version replaces the current one	Operational Value

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
LEG	Appeals and Hearings	Includes records of hearings conducted with regard to issues that affect the school/board. Records include correspondence, reports, discovery findings, hearing proceedings and final decisions.	Originating Department	Event + 5 years	Current School or Fiscal Year		yes			Event = final resolution of the dispute	Limitations Act Municipal Freedom of Information and Protection of Privacy Act
LEG	Claims and Litigations	Includes all liability claims and litigation against or entered into by the boards and schools. Records include reports, correspondence, investigations, etc.	Originating Department	Event + 5 years	Current School or Fiscal Year		yes			Event = resolution of claim	Limitations Act
LEG	Contracts and Agreements	Correspondence and information related to contracts and agreements.	Originating Department	Event + 6 years	Current School or Fiscal Year			yes		Event = expiry of agreement or contract	Limitations Act
LEG	Deeds and Titles	Includes original deeds to any board-owned property.		Permanent Retention							Real Property Limitations Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
LEG	Legal Opinions/Precedent	Records relating to legal opinions and precedents about legal issues identified by the school/board. Records include case law, correspondence, reports, and findings/opinions provided to requestor.		Event + 1 year	Current School or Fiscal Year					Event = Completion of issue	Operational Value
LEG	Property Acquisition and Sales	Includes land purchase agreements, development agreements, property appraisals, valuations and quotes concerning land owned by the board or under consideration for purchase. Also includes plans, correspondence, reports and backup documentation relating to the acquisition or sale of lands.		Event + 20 years	Current School or Fiscal Year					Event = disposal of property	Real Property Limitations Act
LEG	Property Damage/Trespassing Reports	Includes reports and general correspondence regarding property damage, theft or loss. Also includes vandalism reports, copies of repair invoices, monthly and annual summaries.	Originating Department	Event + 5 years	Current School or Fiscal Year		yes			Event = date of damage	Real Property Limitations Act Municipal Freedom of Information and Protection of Privacy Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
LEG	Transportation Accidents	Includes reports and general correspondence accidents. Also includes accident reports and follow-ups as well as bus accident communication notes.	Originating Department	Event + 5 years	Current School or Fiscal Year					Event = date of damage	Municipal Freedom of Information and Protection of Privacy Act Limitations Act
PDD	Outlines/Courses of Study	Includes outlines of available programs and courses of study.	Curriculum	Superseded + 3 years	Current School or Fiscal Year			yes		Superseded = retain until a new version replaces the current one	Copyright Act
PDD	Program Development and Design	Includes proposals, correspondence and curriculum development materials including writing projects teaching units, lesson plans, blank examinations, testing ideas, songs, games, music sheets and other learning materials.	Curriculum	Superseded + 3 years	Current School or Fiscal Year					Superseded = retain until a new version replaces the current one	Copyright Act Education Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
PDD	Program Planning	Includes proposals for new curriculum program, either system-wide or at the school level. Includes meeting notes and reports. Also includes material regarding comparisons with programs in other school boards, provinces and countries. Includes program review reports and other valuations of specific programs in the curriculum. Also includes EQAO.	Curriculum	Event + 3 years	Current School or Fiscal Year					Event = last ministry review or audit	Education Act
PDD	Program/Curriculum Guidelines	Includes Ministry and board guidelines, directives, approved texts and software lists, and related correspondence concerning the provision of specific programs in the curriculum (e.g., junior/senior kindergarten, French immersion).	Curriculum	Superseded + 3 years	Current School or Fiscal Year					Superseded = retain until a new version replaces the current one	Copyright Act Education Act

Yes

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
PDD	Programs and Services: Community	Includes records such as Education Week, summer arts camp, mentorship for Immigrants and community use of schools, day care services and safety and awareness programs. Also includes program reviews and reports of the activities of community liaison officers		Current + 4 years	Current School or Fiscal Year			yes		Current = retain for the current school or fiscal year	Operational Value
PDD	Programs: Continuing Education	Includes objectives, lesson units, principal reports, program reviews, teaching materials and related records used in continuing education programs (such as heritage awareness, second language, multicultural, seniors programs).	Curriculum	Superseded + 3 years	Current School or Fiscal Year			yes		Superseded = retain until a new version replaces the current one	Operational Value

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
PDD	Programs: Parks and Recreation	Includes correspondence and records of programs such as swimming and fitness made available through municipal Parks and Recreation or the YMCA.	Curriculum	1 year	Current School or Fiscal Year						Operational Value
RPL	Planning: School Boundaries	Includes information relevant to the establishment of school boundaries for purposes of enrolment and facility use. Includes boundary descriptions, school attendance areas and maps.	Originating Department	Superseded Retain Permanently	Current School or Fiscal Year			yes		Retain all copies permanently Archival value Operational value	Education Act Operational Value
RPL	Planning: School Enrolments	Includes records regarding planning and development issues within the municipality that may have implications on enrolments within the school system. Includes subdivision plans, official plan amendments, Ontario population reports, and traffic studies.	Originating Department	Current + 4 years	Current School or Fiscal Year					Operational Value	Operational Value

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
RPL	Reference Materials	Includes information gathered as background data to support research and other activities within the board and the school. Information may include articles, white papers, research reports, and information from other schools and boards.	Originating Department	Superseded + 2 years	Current School or Fiscal Year					Superseded = retain until a new version replaces the current one	Operational Value
RPL	Research Curriculum/Program Research	Includes records of any research conducted into curriculum or program development, such as questionnaires, interest surveys and independent research studies.	Originating Department	Event + 5 years	Current School or Fiscal Year			yes		Event = completion of research project.	Operational Value
RPL	Research Data and Work Papers	Includes records of any data, work papers conducted for research, including reports and activities.	Originating Department	Event +5	Current School or Fiscal Year						Operational Value
RPL	Research Projects: Census Data	Includes records of any data, reports and activity.	Originating Department	Event + 5 years	Current School or Fiscal Year		Yes	Yes	No	Event= completion of census.	Operational Value

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
RPL	Research Projects: Curriculum/Program	Includes records of any research conducted into curriculum or program development, such as questionnaires, interest surveys and independent research studies.	Originating Department	Event + 5 years	Current School or Fiscal Year			yes		Event = completion of project	Operational Value
RPL	Research Projects: School System	Includes records relating to internal and external research. Records include applications, surveys and research reports undertaken to capture information about school system issues; student evaluation and scoring systems and student backgrounds; school and career selection; and external research. Records include applications, surveys and research reports.	Originating Department	Event + 6 years	Current School or Fiscal Year			yes		Event = completion of project	Operational Value
RPL	Research Projects: Student Demographics	Includes aggregate reports profiling the characteristics of the student population, such as age, grade, promotion, and country of birth, religion, and other trend data.	Originating Department	Event + 6 years	Current School or Fiscal Year			yes		Event = once the creation of the record occurs	Operational Value

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
RPL	Research Requests	Includes external applications to conduct research from sources such as universities, graduate students, and foundations, and their <u>final reports</u> .	Originating Department	Event + 1 year	Current School or Fiscal Year			yes		Event = completion of external research project	Operational Value
STU	Annual Forms	Includes Computer Use, Data verification, Student Insurance and others collected at the beginning of each school year.	School	1 year	Current School of Fiscal year		Yes	No	No		Operational
STU	Bursaries and Awards	Includes records regarding bursaries and awards presented to students at commencement or graduation.	School	Event + 1 year	Current School or Fiscal Year		yes		yes	Event = retirement/ transfer of student	Municipal Freedom of Information and Protection of Privacy Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
STU	Case Files: Placement Assessments	Records relating to the assessments of students to determine their language background, immigration status, educational history and vocational testing.	School	Event + 1 year	Current School or Fiscal Year		yes		yes	Event = retirement/transfer of student.	Municipal Freedom of Information and Protection of Privacy Act
STU	Case Files: Referrals	Includes a compilation of all records for individual students who are referred for student services. Includes final summaries, confidential reports, and consents to disclosure and referral forms (e.g., IPRC Identification, Placement, and review Committee). May include home instruction/home schooling records.	Educational Services	Event + 10 years	Current School or Fiscal Year		yes		yes	Event = resolution of issue. Subject to inclusion in the OSR. E = date of last contact or date student turns 18 years of age. Subject to inclusion in the OSR.	Municipal Freedom of Information and Protection of Privacy Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
STU	Case Files: Student Welfare	Includes correspondence and confidential reports regarding students where there is suspicion of child abuse, neglect or family violence. A note that a report has been forwarded to the Children's Aid Society is adequate for the OSR	School	Event + 2 years	Current School or Fiscal Year		yes			Event = date of report. This documentation is not considered part of the Ontario Student Record and should be kept in a file in the principal's office for security. A notation that a report has been forwarded to the Children's Aid Society is adequate for the OSR.	Municipal Freedom of Information and Protection of Privacy Act
STU	Examinations and Testing	Includes records regarding student exams and/or province-wide testing (e.g., EQAO). Records include correspondence, exam day schedules, exam day attendance and originals of completed student examinations. Excludes master copies of blank exams.	School	Current + 1 year	Current School or Fiscal Year		yes			Current = retain for the current school year	Municipal Freedom of Information and Protection of Privacy Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
STU	Extracurricular Activities	Includes records regarding school extracurricular activities such as clubs, choir, student council, and athletics.	School	Current + 1 year	Current School or Fiscal Year					Current = retain for the current school year	Operational Value
STU	Educational Services	Includes records regarding SEA and SIP claims/reports, ECPP Ministry reports, Referrals, IPRCs.	Educational Services	Event + 5 years	Superseded		yes		no	Event = retirement	Education Act
		Clinical records/reports	Educational Services	Until Student's 29 th birthday			yes		no	Ontario Psychologists Association	Legal
		Speech-Language reports	Educational Services	Until Student's 29 th birthday			yes		no	College of Audiologists & Speech-Language Pathologists of Ontario	Legal
STU	Guidance Materials	Includes brochures, calendars, description sheets and catalogues relating to career opportunities, external school programs, post-secondary education, private schools, and scholarships to support students.	School	Superseded	Current School or Fiscal Year					Superseded = retain until a new version replaces the old one	Operational Value

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
STU	Home-schooling	Includes correspondence, Notification to Homeschool.	Office of Safe Schools Coordinator	10 years			yes				Education Act
STU	Incident Reports: Health and Safety and Student Safety:	Includes general records relating to incidents that affect health and safety of students, e.g., emergency response, school illness, infections, accidents, quarantines, etc. Records include reports, OSBIE Forms correspondence and summaries and information related to actions taken by staff. Excludes medical health records.	Facilities	Event + 6 years	Current School or Fiscal Year					Event = Resolution of issue.	Occupational Health and Safety Act Education Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
STU	Office Index Cards	Includes all office index cards containing personal information, as well as retirement or transfer information on individual students, which is available for immediate access and as OSR backup information. The OIC may be retained electronically if a hard copy can be readily produced.	School	On-site Event + 5 years Off-site 50 years Total Retention = Event + 55 years			yes			E = retirement or transfer of student.	Municipal Freedom of Information and Protection of Privacy Act Education Act

STU	Ontario Student Records	Includes original Ontario Student Record folders with all documentation maintained for the OSR system, such as final student report cards and Ontario Student Transcripts, records of instruction in French/Native as a second language, documentation file, Special Education programs and SALEP. May include reports from third parties in accordance with the Ministry's Guideline.	School	On-site Event + 5 years Off-site or electronic storage 50 years Total Retention = Event + 55 years	Event = retirement or transfer of student*, computer database record purged, on retirement/transfer.	Municipal Freedom of Information and Privacy Act Education Act
					Note: Includes electronic data. Note: 5 years post-retirement, shred all records but the office index card, the transcript and the OSR folder in accordance with the OSR guideline. Retention for Violent Incidents Report.– Event + 3 or Event + 5	

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
STU	Programs: Cooperative Education	Includes correspondence with potential employers, surveys, and monthly monitoring teacher reports, statistics and other records of co-operative education programs. Also includes apprenticeship programs.	School	Event + 6 years	Current School or Fiscal Year					Event = termination of work placement.	Municipal Freedom of Information and Protection of Privacy Act
STU	Programs: Non-Classroom	Includes records regarding student exchanges and field trips and arrangements for special events related to specific programs, such as concerts, festivals, track meets, facility tours, tournaments, art or essay contests, and science fairs. Records include correspondence, plans, schedules, etc.	School	Current + 1 year	Current School or Fiscal Year			yes		Current = retain for the current school or fiscal year.	Municipal Freedom of Information and Protection of Privacy Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
STU	Student Enrolment and Attendance	Includes registers and reports concerning the enrolment/attendance of students, recording of daily attendance, and daily absence reports. Also includes class registers for non-school system programs such as continuing education, and heritage language programs.	School	Current + 2 years Permanent retention for registers prior to 1970 Off-site: Permanent			yes			Current = Retain for the current school year Permanent retention for registers prior to 1970	Municipal Freedom of Information and Protection of Privacy Act Education Act
STU	Registers: Student Marks	Includes information on students' courses completed, marks received and mark verification sheets. Excludes report cards.	School	Current + 1 year			yes	yes		Current = retain for the current school year Student marks are included in OSR as part of report card.	Municipal Freedom of Information and Protection of Privacy Act
STU	Student Exchanges	Includes information on plans for exchanges, exchange reports and exchange schedules.	School	Event + 1 years	Current School or Fiscal Year		yes	yes		Event = retention begins once exchange is completed	Municipal Freedom of Information and Protection of Privacy Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
STU	Student Health Records	Includes medical and health information regarding students required for the care and treatment of students in the school setting. Includes pediculosis, medical emergency plans, administration of medication plans and other health related materials.	School	Current + 1 year			yes		yes	Subject to inclusion in OSR	Municipal Freedom of Information and Protection of Privacy Act Personal Health Information and Protection Act
STU	Student Meal Programs	Includes records of school milk and breakfast programs, such as lists of students involved in the programs.	School	Current + 1 year			yes			Current = retain for the current school year	Municipal Freedom of Information and Protection of Privacy Act
STU	Student Records: Continuing Education	Includes mature student appraisals, marks and other student-centered records for continuing education courses.	School	Event + 1 year	Current School Year		yes		yes	Event = retirement or transfer of student.	Municipal Freedom of Information and Protection of Privacy Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
STU	Student Records: Co-op Programs	Includes records of individual students participating in co-operative education work assignments, such as copies of work education agreements, evaluation forms for employer interviews, training plans and applications for programs, and student evaluation forms.	School	Event + 1 year	Current School or Fiscal Year		yes		yes	Event = retirement or transfer of student. Subject to inclusion in the OSR.	Municipal Freedom of Information and Protection of Privacy Act Education Act
STU	Student Records: External Program Participation	Includes requests, consent/permission forms, correspondence and reports regarding school field trips and reports relating to the student(s) involved in student exchanges.	School	Event + 1 year	Current School or Fiscal Year		yes	yes	yes	Event = completion of exchange or program. Subject to inclusion in OSR.	Municipal Freedom of Information and Protection of Privacy Act Education Act
STU	Student Records: International Students	Includes records on International student files, medical information and home stay contacts. (Excludes OSR documentation)	International Student Program Department	Event + 1 year	Current School or Fiscal Year		yes		yes	Event = completion program. Subject to inclusion in OSR.	Municipal Freedom of Information and Protection of Privacy Act Education Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
STU	Student Records: Special Needs	Includes records for students requiring special equipment to assist in the instruction of the student. Includes records of individual students who are referred for placement in special program classes, such as applications for admission, tests, assessments and raw data (e.g., IEP).	School	Event + 1 year	Current School or Fiscal Year		yes		yes	Event = retirement or transfer of student. Subject to inclusion in the OSR.	Municipal Freedom of Information and Protection of Privacy Act
STU	Student Registrations Applications Forms	Includes blank registration forms and applications for school entry or special programs such as French Immersion, summer school or continuing education. Also includes copies of applications to universities and colleges, etc.	School	Superseded	Current School or Fiscal Year		yes		yes	Superseded = retain until a new version replaces the current one. Include in OSR	Municipal Freedom of Information and Protection of Privacy Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
STU	Student Reporting	Includes all reports concerning individual students that are retrievable by student name or other identifier, such as first language reports, non-resident student reports, class list reports, Ontario Scholar lists, student online transaction listings and Student Information System edits.	School	Event + 1 year	Current School or Fiscal Year		yes				Municipal Freedom of Information and Protection of Privacy Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
STU	Suspensions Expulsions	Includes records of students who are suspended/expelled from school and all school-related activities in accordance with the Education Act. Includes investigative notes, reports and appeal records.	School	Suspension Documents Event + 3 years Expulsion Documents Event + 5 years	Current School or Fiscal Year		yes		No	Event = incident of suspension, where no further suspensions have occurred. Records may be removed or retained by principal if deemed appropriate. Suspension for violent incidents to be retained as follows Event + 3 years or Event + 5 years (as below) No Suspension/No Expulsion – Event + 3 years (Event = three years without report of a violent incident to police).	Municipal Freedom of Information and Protection of Privacy Act Education Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
STU	Timetables Schedules	Includes elementary course timetables, secondary school course calendars, yard duty schedules, school year calendars, school bell schedules, and related records.	School	Superseded	Current School or Fiscal Year			yes		Superseded = retain until a new version replaces the current one	Operational Value
STU	Transfers Exits Admittances Retirements	Includes reports and forms recording the transfer, exit, room changes, promotions or admittance of students from schools. Includes signed and dated forms authorizing student admissions, transfers or retirements. Also includes registration forms and applications for school entry or special programs such as French Immersion, summer school or continuing education. Also includes copies of applications to universities and colleges, etc.	School	Event + 1 year	Current School or Fiscal Year		yes		yes	Subject to inclusion in the OSR.	Municipal Freedom of Information and Protection of Privacy Act Education Act

Function	Record Series	Description	Responsible Department	Retention Responsible Department	Retention Non-Responsible Department (Copies, etc.)	Vital Record	Personal Information	Archival Record	Included in OSR	Notes	Value or Record
STU	Transportation: Student Bus Services	Includes records concerning transportation/busing for transportation of students to and from schools, Special Education, field trips, and special programs. Records include bus schedules, requests for transportation, bus routes, boundaries and student lists (names and addresses).	School	Superseded + 1 year	Current School or Fiscal Year		yes			Superseded = retain until a new version replaces the old one	Municipal Freedom of Information and Protection of Privacy Act Education Act
STU	Visitor Logs	All logs used to track access to schools/site.	School	Permanent	Current school/site		yes	yes			