



DISTRICT PRACTICE 2200

RECORDS AND INFORMATION MANAGEMENT AND ACCESS REQUESTS

RECORDS AND INFORMATION MANAGEMENT CLASSIFICATION SYSTEM/ RETENTION SCHEDULE

The following retention schedule outlines the minimum amount of time that School District No. 6 (Rocky Mountain) records must be retained and who is responsible for their retention and destruction.

| FINANCIAL RECORDS | |
|--|------------------------------------|
| Responsibility: Finance Department | |
| Annual budget and summary supporting documents | Permanent |
| Auditor's reports | Permanent |
| Cancelled cheques | 7 years after the year of creation |
| Cheque duplicates, invoices, requisitions, purchase orders | 7 years after the year of creation |
| Employee travel claims | 7 years after the year of creation |
| Ministry of Education financial information reports | Permanent |
| General ledger | Permanent |
| Invoices billed | 7 years after the year of creation |
| Subsidiary ledgers and journals | 7 years after the year of creation |
| Receipts issued | 7 years after the year issued |
| Bank statements, debit and credit notes | 7 years after the year of creation |
| Deposit books / cash receipts | 7 years after the year of creation |
| Loans, authorization | 7 years or term of loan, if longer |
| Loans, cancelled notes | 7 years after the year of creation |
| Stop payment orders | 1 year after the year of creation |

POLICY 2200 RECORDS AND INFORMATION MANAGEMENT
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| HUMAN RESOURCE RECORDS | |
|---|---|
| Responsibility: Human Resources Department | |
| Applications and job competitions | 1 year after position is filled |
| Collective agreements with unions | Permanent |
| Contracts with individual employees | 7 years after the year employee leaves the School District |
| Employee files | 7 years after the year employee leaves the School District |
| First aid certification | 7 years after the year employee leaves the School District |
| Leave records | 7 years after the employee leaves School District |
| Individual grievance files | Permanent |
| Letters of discipline | According to collective agreement or 7 years after the year employee leaves the School District |
| Personnel file | 7 years after the year employment ceases |
| Reference checks | 1 year after position is filled |
| ERP Records | 1 year after employment ceases |
| ERP - TOC Dispatch | 1 year |
| Seniority lists | Permanent |
| Support staff subs | 1 year |
| Unsolicited resumes | 7 months |
| Violent incident reports | 7 years after the year of creation |

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| | |
|--|--------------------------------------|
| INFORMATION SYSTEMS | |
| Responsibility: Information Systems | |
| User IDs | When user is removed from the system |
| System problem tracking | When user is removed from the system |

| | |
|---|---|
| PAYROLL RECORDS | |
| Responsibility: Payroll Department | |
| Employee payroll register | 7 years after the year employee leaves the District |
| Employee attendance records | 7 years after the year employment ceases |
| Payroll benefits | 7 years after the year employment ceases |
| Payroll database | 7 years after the year employment ceases |
| Payroll deductions | 7 years after the year employment ceases |

| | |
|------------------------------|------------------------------------|
| RISK MANAGEMENT | |
| Insurance policies | Useful Life |
| Accident reports - Students | Useful Life |
| Accident reports - Employees | 6 years after the year of creation |

| | |
|--|------------|
| BUILDINGS & PROPERTY | |
| Appraisal and inventory records | Indefinite |
| Capital expenditure authorization | Indefinite |
| Plans, specifications, and related documents | Indefinite |
| Titles and deeds | Indefinite |
| Borrowing authority (e.g. Orders-in-Council) | Indefinite |
| Leases | Indefinite |

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| STUDENT RECORDS | |
|---|---|
| Student information system data Responsibility: Information Systems | Permanent |
| Permanent record cards Responsibility: Schools | Permanent |
| Attendance reports and registers Responsibility: Schools | Permanent |
| Out-of-boundary attendance requests Responsibility: Assistant Superintendent Office | 1 year after decision is made about the request |
| Provincial scholarships and district awards Responsibility: Assistant Superintendent | Permanent |
| Senior secondary school statement Responsibility: Secondary Schools | Permanent |
| Teachers' student files Responsibility: Teacher | 1 year after teacher no longer has student (selected records transferred to Primary Student File) |
| Other student records Responsibility: Schools, Student Support Services | Useful life of record |

| GENERAL ADMINISTRATION | |
|---|------------|
| Insurance Claims | Indefinite |
| Miscellaneous Reports WorkSafe BC, fire marshall, health, boiler inspection, etc.) | Indefinite |

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| CORPORATE SERVICES | |
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| Board policy | Indefinite |
| Board committee reports | Indefinite |
| Board minutes (open and closed meetings) | Indefinite |
| Wage and salary agreements | Indefinite |
| List of electors | 2 years |
| General notices | 1 year |
| Oaths and declaration | Specified Term of Office |
| OTHER | |
| General Correspondence | 3 years after the year of creation |

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