

# School Retentions

**What is a record?** A 'record' means a record of information in any form regardless of its medium. Records include books, documents, maps, drawings, photographs, letters, vouchers and papers and any other information that is written, photographed, recorded or stored in any manner.

Some **questions** to ask yourself to determine where a record should be filed and/or whether it needs to be kept and for how long:

Do I require these records to do my day to day business?

Are these the original or primary records?

Can I get these records in any other part of the organization, eg. Central Office?

Do these records have Historical, Business or Legal value?

Are these transitory records?

## **Records Management Abbreviations & Terminology:**

**S/O** – Superseded/Obsolete – once new documentation is received, the old documentation is filed in archives or destroyed, depending upon retention period assigned. S/O + 1 / D, etc –in this example the record is superseded obsolete, kept an additional 1 year then destroyed.

**D**- Destroy – once document has met its retention period, it can be destroyed.

**S/R** – selective retention – once the document has met its retention period, it is reviewed for disposition. If you wish to keep the document longer, you may. If the document is no longer of use, you may destroy it.

**OP** –out of province

**IP** – in province

**NL** – providing there is No Litigation

**COMP** – retain until completion/end of term. Ex: contract

**COMP + 7/D** – retain 7 years after completion then Destroy

**TERM** – upon termination

**CYE** - calendar year end –1 year period that begins on Jan 1 and ends on Dec 31

**FYE** – fiscal year end - completion of a 12 month accounting period. i.e. Sept 1– Aug 31

**PERM** – permanent retention

**Transitory**- will have a short life span during which they serve a particular purpose but are not required to provide evidence of decision-making and can then be destroyed

**Destruction Notice & Inventory Forms**- signed by school admin staff and Principal. Must be sent into Division Office & signed off before documents can be destroyed. Only use 1 destruction notice to any number of inventory forms. If using inventory forms it is not necessary to fill in content section on destruction notice. i.e. Financial records- see Inventory form for details.

**Student File Request form**- inventory the same as if it were the CUM file i.e. each name, aka & birth date

Financial Records - all records that are created and managed by the school independent of Central Office (i.e. SGF, bank records/statements, cheques, deposit books)	- FYE + 7 years/ Destroy
Financial Records - that are managed by Central Office but copies are retained at the school (i.e. Petty Cash, PO's, Visa, Expense Claims)	- max 2 years/ Destroy (not necessary for Schools to keep)
All Field Trip Forms/Documents	-FYE + 3/ Destroy – provided there is no incident - FYE +10 years archive/ SR/Destroy – if there is an incident - if litigation, keep permanent
Class Discipline File Suspensions / Expulsions	- FYE + 1 year/ Destroy - FYE + 3 years/Destroy
Class Lists	- FYE + 1 year / Destroy
Classroom Exams/Tests- completed grade tests Diploma Exams/Achievement Tests	- term + 0/ Destroy -5 years / Destroy
Deceased Student Files	- 7 years / Destroy
Diploma Exam results (gr. 12) & Achievement Tests results (grades 3, 6, & 9)	- age 26 / Destroy
Fire Safety - drill logs, reports, equipment checks	- S/O + 10 years/ Destroy
Teacher Plan Books	- FYE + 1 year/ Destroy
Notes from Parents- such as bus changes, leaving school early, pick-ups/ changes, appointments, etc.	- FYE + 3 years/ Destroy – provided no incident
Recorded Score Tests – Ex: Schonell	-FYE + 1 year / Destroy
Report Cards	- copy in CUM File (Mandatory)
School Annual Education Results Report	-5 years/ Destroy
School Calendars	- FYE +10 years/ Destroy
Student Contact Information	- S/O / Destroy
Parent Council Meeting Minutes	-FYE + 7 years /Destroy
School Emergency Response Plan	- S/O + 10 years / Destroy
School Inventory Reports	- S/O + 7 years / Destroy
School Newsletters	-FYE + 3 years / Destroy
Staff Meeting Agendas/Minutes	- FYE +5 years / Destroy
Student Accident Reports	-T/ FYE + 10 years / Destroy
Staff Timesheets (school copies)	- FYE + 1 year / Destroy

Student Marks K- Grade 9	- FYE + 1 year / Destroy
Student Marks -CEU's submission Grade 10- 12	- FYE + 7 years/ Destroy
Student Attendance	- an attendance summary to be put in CUM file annually (Mandatory)
Student Confidential File	-keep until student reaches 26 years of age/ Destroy
Student Cumulative File	- keep until student reaches 26 years of age/ Destroy
Student Demographics	- keep until student reaches 26 years of age/ Destroy (Mandatory in CUM file)
Student IPP (Individual Program Plan)	- keep in CUM File until student reaches 26 years of age/ Destroy
Student Administration of Medication Forms	- FYE + 10 years/Destroy - if litigation keep Permanent
Student Modules –Financially Funded (Grades 10-12)	-FYE + 1 year/ Destroy (changed from 7 years - AB Works 2013)
Student File Transfer Request Forms	-keep until student reaches 26 years of age/Destroy
Student File Transfer Request – In Province send original CUM file	- keep until student reaches 26 years of age/ Destroy(keep copy of birth certificate, attendance and registration form)
Student File Transfer Request – Out of Province send copy of CUM file and keep original	- keep until student reaches 26 years of age/ Destroy (keep copy of birth certificate, attendance and registration form)
SIS- Student Information system	- FYE + 7 years/ Destroy
Student Union Meeting Minutes	-FYE + 7 years/Destroy
Teacher Plan books	- FYE + 1 year/Destroy
Text Books	-S/O /Destroy