



RECORDS MANAGEMENT

Background

Divisions are required to maintain records of all proceedings of Board meetings including agenda and minutes. In addition, the approved budget, by-laws, legal agreements, accounts and financial statements are subject to ratepayer inspection.

The Student Record Regulation sets out the requirements and obligations regarding the management of student records maintained by a Board.

Procedures

- 1. Records to be retained until any such time that the Division ceases operations include:

Table with 2 columns: ITEM, LOCATION. Rows include: Trustee oaths of office, Original Board minutes and by-laws, Architectural design reports, 'as built' facility drawings, facility construction contracts and construction progress reports, Division budgets and audited financial statements, Duplicate certificates of title, easements and leases, Teacher Retirement Fund and Local Authorities Pension Plan annual reports.

- 2. Records to be retained until seven (7) years after termination, retirement or death include:

Table with 2 columns: ITEM, LOCATION. Rows include: Personnel files, Payroll registers and pay histories including benefits, Records of employment; absence, history and medical.

- 3. Records to be retained for varying lengths of time include:

Table with 2 columns: ITEM, LOCATION. Section: TEN (10) YEARS. Rows include: Capital purchasing/payable records including purchase requisitions and orders, invoice vouchers and cheque copies, Legal claims and actions upon completion, Facility and land appraisals.



| ITEM | LOCATION |
|--|-----------------|
| SEVEN (7) YEARS | |
| <ul style="list-style-type: none"> Capital and operating general accounting ledgers; related journal entries; fixed assets; debentures; capital loan and funds invested years ledgers | Division Office |
| <ul style="list-style-type: none"> Contracts and agreements | Division Office |
| <ul style="list-style-type: none"> T-4 income tax slips | Division Office |
| <ul style="list-style-type: none"> Tenders for new facilities | Division Office |
| <ul style="list-style-type: none"> Operating purchasing, payable and accounting records including purchase requisitions and orders, invoice vouchers, cheque copies, bank statements and deposit slips | Division Office |
| <ul style="list-style-type: none"> Government grant applications and approvals | Division Office |
| <ul style="list-style-type: none"> Tuition and other invoices | Division Office |
| <ul style="list-style-type: none"> Collective salary agreements upon expiry | Division Office |
| <ul style="list-style-type: none"> Summary of student enrolments | School Level |
| <ul style="list-style-type: none"> Student records <ul style="list-style-type: none"> Active | School Level |
| <ul style="list-style-type: none"> <ul style="list-style-type: none"> Inactive seven (7) years after the year the student is presumed to graduate from grade 12) | Division Office |
| <ul style="list-style-type: none"> <ul style="list-style-type: none"> Student Field trip documentation | School Level |
| <ul style="list-style-type: none"> <ul style="list-style-type: none"> Student injury/Incident Report Form was completed will be kept until the date upon which the student(s) named reach twenty-one (21) years of age | School Level |
| <ul style="list-style-type: none"> School accounting records and audit reports | School Level |
| THREE (3) YEARS | |
| <ul style="list-style-type: none"> General administration files | Division Office |
| <ul style="list-style-type: none"> Student suspension or expulsion information | School Level |
| TWO (2) YEARS | |
| <ul style="list-style-type: none"> Board meeting agendas | Division Office |
| ONE (1) YEAR | |
| <ul style="list-style-type: none"> Supply tenders | Division Office |
| <ul style="list-style-type: none"> Solicited applications | Division Office |
| CURRENT YEAR | |
| <ul style="list-style-type: none"> Bus pass applications | Division Office |
| <ul style="list-style-type: none"> Insurance policies | Division Office |
| <ul style="list-style-type: none"> Employment applications | Division Office |

4. Destruction of Records

4.1 Each school or office is responsible for properly packaging and labelling the records if stored at the Division Office and for advising the Division Office annually of records to be shredded.

4.2 Digital data records to be deleted.



5. The Secretary-Treasurer is responsible for the maintenance of required minutes and records.
6. The Secretary-Treasurer is responsible for establishing and implementing procedures to respond to requests from electors for public documents and records.
7. An appropriate per page photocopying charge will be levied to any elector requesting copies of the above noted documents.

Reference: Section 33, 52, 53, 68, 197, 222, 225 Education Act
Student Record Regulation 71/99
Information Bulletin 3.2.5 – Access to Information
Information Bulletin 3.2.7 – Student Record Regulation Information
Freedom of Information and Protection of Privacy Act
FOIP Regulation 200/95