



**SD 42 PROCEDURE: 5701.2**

**RECORDS AND INFORMATION MANAGEMENT  
CLASSIFICATION SYSTEM / RETENTION SCHEDULE**

The following retention schedule outlines the minimum amount of time that School District 42 (Maple Ridge - Pitt Meadows) records must be retained and who is responsible for their retention and destruction.

<b>FINANCIAL RECORDS</b>	
<b>Responsibility: Finance Department</b>	
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

<b>HUMAN RESOURCE RECORDS</b>	
<b>Responsibility: Human Resources Department</b>	
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 district
Employee files	7 years after the year employee leaves district
First Aid Certification	7 years after the year employee leaves the 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 district
Personnel File	7 years after the year employment ceases
Reference checks	1 year after position is filled
SDS	1 year after employment ceases
SDS - 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

<b>INFORMATION SYSTEMS</b>	
<b>Responsibility: Information Systems</b>	
User ID's	When user is removed from the system
System Problem-Tracking	When user is removed from the system

<b>PAYROLL RECORDS</b> <b>Responsibility: Payroll Department</b>	
Employee payroll register	7 years after the year employee leaves district
Employee attendance records	7 years after the year employment ceases
Payroll benefits	7 years after the year employment ceases
Payroll data base	7 years after the year employment ceases
Payroll deductions	7 years after the year employment ceases

<b>STUDENT RECORDS</b>	
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 Superintendents (Elementary and Secondary) Offices	1 year after decision is made about the request
Provincial Scholarships and District Awards Responsibility: Office of Assistant Superintendent - Secondary	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

<b>RISK MANAGEMENT</b>	
Insurance Policies	Useful Life
Accident Reports - Students	Useful Life
Accident Reports - Employees	6 years after the year of creation

<b>BUILDINGS &amp; PROPERTY</b>	
Appraisal and Inventory Records	Indefinite
Capital Expenditure Authorization	Indefinite
Plans and Specifications and Related Documents	Indefinite
Titles and Deeds	Indefinite
Borrowing Authority (e.g. Orders-in-Council)	Indefinite
Leases	Indefinite

<b>GENERAL ADMINISTRATION</b>	
Insurance Claims	Indefinite
Miscellaneous Reports (WCB, Fire Marshall, Health, Boiler Inspection, etc.)	Indefinite

<b>CORPORATE SERVICES</b>	
Board Policy	Indefinite
Board Committee Reports	Indefinite
Board Minutes (Open and Closed)	Indefinite
Wage and Salary Agreements	Indefinite
List of Electors	2 years
General Notices	1 year
Oaths and Declaration	Specified Term of Office

<b>OTHER</b>	
General Correspondence	3 years after the year of creation

**APPROVED: September 12, 2012**