

Record Series	Scope Notes (Description)	Responsible Department	Retention/Notes	Retention Value
AM Administrative Management	The function of overseeing the administration of teams and units within the board and schools. Records supporting this function relate to administrative committees' decisions and meetings, and internal administrative support or services.			
AM-01 Associations/ Organizations (to which staff belong)	Includes reports, newsletters, publications, conference and workshop information and proceedings from organizations to which staff belong. i.e., CASS, ASBOA, ATA. <i>formerly 11300, 11400, 12101,13200's</i> NOTE: Does not include internal, division-facilitated organizations i.e, Administrative Association SEE AM-03 Meetings	Originating Department	Not stored on DocuShare; transitory records.	Operational value
AM-02 Committees - Internal & External (NON-BOARD)	Includes records of committees and councils on which staff members participate as members. Records include meeting minutes, notices, reports, recommendations and supporting documentation. Excludes School Councils SEE: CG-03 Excludes Corporate governance committees (trustee) - SEE: CG-03	Originating Department	3 yrs after committee is dissolved OR the mandate of the committee has been met.	Operational value
AM-03 Meetings	Records include agendas, minutes, reports, resolutions, records of decision, terms of reference, and supporting documents.ie, Staff meetings, Safety meetings, Central Administration, Superintendent's, Admin Association, etc. Excludes governance committees (e.g., admin. council, exec. council, etc.). SEE: CG-03 <i>formerly 12210, 12220, 11305</i>	Originating Department	3 yrs	Operational value. Not specified 106, 183, 222
AM-04 Forms Inventory	Includes records regarding masters/originals of blank hard copy and electronic forms history used by the jurisdiction.	Originating Department	Until obsolete or superseded	Operational value
AM-05 Service Requisitions and Reports (Office Services)	Includes records relating to translation, audio visual services, duplicating/ printing services and mail/courier services, requisitions and memos for services, confirmations and service logs/reports, correspondence, reports, etc. Excludes work order for Facilities Maintenance SEE: FM-09 series <i>Formerly 20050</i>	Originating Department	Not stored on DocuShare; transitory records.	Operational value
AM-06 Administrative Business	Includes non-capital project work, records of administrative issues, etc.	Originating Department		Operational value
CG Corporate Governance	The function of governing boards/schools and exercising legal authority and control. The corporate governance structure specifies the distribution of rights and responsibilities among different participants in boards/schools, such as the board and staff, and spells out the rules and procedures for making decisions on its affairs. Includes resolutions, bylaws, policies and procedures, charters, board meeting administration, and strategic planning			
CG-01 Articles of Incorporation and Constitution	Includes records related to the operation of the school board and capture details about the legal entity.	Corporate Office	2 yrs after Dissolution of the corporation	55

Record Series	Scope Notes (Description)	Responsible Department	Retention/Notes	Retention Value
CG-02 Board-led Programs & Events	Includes records related to district-wide and/or area program oversight and administration of programs that do not belong to a specific function. I.e., Trustee Visits, Gala, Board workshops, tradeshow, etc. Excludes: Educational Programs, Community Programs, Health and Safety Programs, etc. SEE applicable function series.	Originating Department	3 yrs after Program is discontinued.	Operational Value
CG-03-01 Committees - General	Includes routine committee work such as: school council, ad hoc committees, and task forces. I.e., Suspension/discipline committee, ASBA Zone One, Committee, committees struck because of agreements. Records include-agendas, minutes, reports, and supporting documentation. <i>formerly 11550	Originating	2 yrs after Committee is dissolved or mandate of the committee has been met..	106, 171, 180, 183
CG-03-02 Standing Committees (Comm	Regular & organizational committees consisting of trustees, created by the board for a specific purpose. I.e., Council of School Council, TBAC, Audit, Instructional Allocation, TLC, COTW etc. Includes agenda, minutes, resolutions, terms of reference, meeting briefs and supporting documentation. Excludes: Routine committee work SEE: CG-03	Corporate Office	2 yrs after Committee is dissolved or mandate of the committee has been met..	55, 106, 171, 174
CG-04 School Councils	Includes records of the school council; agendas, minutes, terms of reference, and supporting documentation. Excludes Parent societies/associations/advisory committees. These are separate entities from the board.	School Council/Corporate Office	3 yrs These records are copy sets, but may be kept to ensure continuity of school councils.	Operational Value 180
CG-05-01 Guidelines, Policies and Directives: External Memoranda and Correspondence	Includes documentation about initiatives and guidelines provided by Alberta Education. Records include memoranda, directives, and correspondence such as Alberta Education Guidelines and Ministry Policy/Program Memoranda (Records include Ministerial Orders and Bylaws as accepted by the Board's Substantive motions) <i>formerly 17100 NOTE: Ministerial Orders and Bylaws are located in LE-05-04	Corporate Office	3 yrs	Operational Value Not Specified 92, 173,
CG-06-01 Board-approved Guidelines, Policies and Directives DEVELOPMENT	Includes records relating to the development of board and school operating practices, activities, and policies that apply district-wide. Includes best practices, guidelines, procedures, handbooks and standards developed by the Board.Retain for E+2 years. E=once superseded or obsolete. <i>formerly 17000	Corporate Office	2 yrs after obsolete or superseded. Core records may have archival value and should be moved to CG-06-02 or appropriate archive..	Operational Value. Not specified 173, 175, 178, 179, 182
CG-06-02 Board-approved Guidelines, Policies and Directives APPROVED	Includes records of approved board and school operating practices, activities, and policies that apply district-wide. Includes best practices, guidelines, procedures, handbooks and standards approved by the Board. .Retain for E+2 years. E=dissolution of the board.</><i>formerly 17200, 17300	Corporate Office	2 yrs after Dissolution of the Board	Operational Value. Not specified 173, 175, 178, 179, 182

Record Series	Scope Notes (Description)	Responsible Department	Retention/Notes	Retention Value
CG-06-03 Administrative Guidelines, Policies and Directives - DEVELOPMENT	Includes records regarding changes to or development of directives by Central Administration referencing internal controls. Records may also include regulations and procedure manuals, guidelines and directives, and other procedures established by departments and programs. Retain for E+2 years. E=once superceded or obsolete. formerly 17000 and all 005s	Corporate Office	2 yrs after obsolete or superseded.	Operational Value. Not specified 151, 152, 173, 175
CG-06-04 Administrative Guidelines, Policies and Directives - APPROVED	Includes records of directives approved by Central Administration referencing internal controls. Records may also include regulations and procedure manuals, guidelines and directives, and other procedures established by departments and programs. Retain for E+2 years. E=dissolution of the board.	Corporate Office	2 yrs after Dissolution of the Board	Operational Value. Not specified 151, 152, 173, 175
CG-07 Intergovernmental and Community Engagement	Includes correspondence and reports between the board and relative organizations, such as the municipality, provincial ministries, Chamber of Commerce, partnering school boards etc. Also includes reports, membership confirmations, engagement programs, etc.	Originating	8yrs Some correspondence may have long term value.	Operational value.
CG-08 Organization Structure	Includes records regarding reporting relationships, organization structure, organization analysis, etc. for both schools and school board. Includes organizational charts and school profiles. Includes LINK TO Administrative Procedure	Corporate Office	3 yrs May have archival value	Operational Value
CG-09 Trustee Management (filed by trustee name)	Includes elections information, declaration of interests, personal information, directories and news items regarding the trustees. Also includes trustees' distribution and orientation information.	Corporate office	2 yrs after expiry of term of office.	Not specified , 176
CG-10 Elections	Includes records of elections procedures and information. Retain for 5 years. NOTE: Ballot boxes are to be kept sealed for 6 weeks following the election (Section 101 of the LAEA). After election, the successful candidate's nomination papers are kept for the term of the office (Section 28(5) of the LAEA). In CG-09	Corporate office	5 yrs	Operational Value. 232, 230
CG-11 Information Requests from Trustees (filed by trustee name)	Includes information collected in response to specific requests from trustees. Includes ad hoc requests for information, speaking notes, parent complaints, etc..	Corporate office	2 yrs after trustee's term of office	Operational Value
CG-12 Complaints	Includes records related to complaints about the board and/or school and its activities. Includes correspondence, investigations, findings and related reports regarding resolution. Also includes complaints retained by area offices on schools. NOTE: any records included here should have personal information redacted prior to filing.	Originating Department	1yr after Date complaint resolved	76

Record Series	Scope Notes (Description)	Responsible Department	Retention/Notes	Retention Value
CO Communication	The function of promoting and marketing board and school programs and services. Records in this function include board and school communication and press releases, speeches, websites, public relations activities, events and news releases; materials relating to marketing research, publications and reports.			
CO-01 Advertisements	Includes publications, artwork and copies of advertisements placed by the board or schools. Excludes: advertisements for job postings. SEE HR-13	Originating Department	3yrs	
CO-02 Appreciation and Commendation	Includes general commendations, certificates of appreciation and petitions received from the general public and parents. Excludes: records relating to specific employees or student records SEE: HR and SI series	Originating Department	3yrs	
CO-03 Publications and Communiqués	Includes memos, brochures, correspondence, yearbooks, handbooks, marketing materials, calendars, annual reports, brochures, newsletters, and other promotional materials and related information about programs and activities sponsored by the board or by schools.	Originating Department	1yr after record is deemed no further value to the school or on school closure	
CO-04 Memos, Special Events, Presentations, Ceremonies and Celebrations	includes speeches, 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, community engagement etc.). Records include program schedules, correspondence, brochures, and event activity details.	Originating Department	3yrs	
CO-05 Media Kits, Communications and News Releases	Includes records regarding board relations with the various media. Includes board highlights, press releases, marketing and information releases, speeches, photographs, correspondence, etc.	Originating Department	1yr after record is deemed no further value to the school or on school closure	
CO-06 Memorabilia and Branding	Includes school/board memorabilia, collectibles and other historical items that reflect the individual nature of the schools, such as informal school/board and school authority histories, logos and crests, songs, etc.	Schools / Originating Department	1yr after record is deemed no further value to the school or on school closure	E = Once of no further value to the school or on school closure
CO-07 Press Clippings and Communication about the Division	Information that comes from external sources pertaining to the board; includes reports from newspapers, magazines, websites and other publications regarding the board and school authority, school, staff, students and trustees	Originating Department	1yr after record is deemed no further value to the school or on school closure	
CO-08 Communications Projects - originating from the Division	Information that is prepared by communications on behalf of the board.	Originating Department	10yrs	Records may be retained for longer period for historical purposes.

Record Series	Scope Notes (Description)	Responsible Department	Retention/Notes	Retention Value
CP Community Programs and Services (Filed by Program Name)	The function of offering programs and services to the community through school and board and school authority facilities. Generally refers to programs that are not part of day school.		Examples: Night school and summer programs, international hosting and services to the community including day care and safety awareness.	
CP-01 Volunteer Programs	Includes records volunteer programs such as recruitment workshops, annual receptions and volunteer activities in schools.	Originating Department	3yrs	Operational Value
CP-02 Community Programs and Services	Includes records on the administration of specific programs, program reviews and reports of the activities of community liaison officers.	Originating Department	1yr after the program has ended	Operational Value
CP-03 Community 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). Excludes: Student records pertaining to these programs. SEE: SI-11	Originating Department	1yr after the program has ended	Operational Value
CP-04 Community Programs: Driver Education	Includes program outlines and correspondence concerning education in the safe operation of motor vehicles	Originating Department	1yrs after completion of the program.	Operational Value
CP-05 Community 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/YWCA	Originating Department	1yr after the program has ended	Operational Value
EP Educational Programs	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.			
EP-01 Development and Design	Includes proposals, correspondence and curriculum development materials.	Originating Department	5yrs after Termination of the program.	15, 16, 17, 18, 19, 20, 21
EP-02 Planning and Curriculum Guidelines	Includes directives, guidelines and proposals for new curriculum programs. Includes meeting notes and reports, material regarding comparisons with programs in other school boards. Includes program review reports and other valuations of specific programs in the curriculum. (e.g., junior/senior kindergarten, French immersion).	Originating Department	5yrs after Implementation of the program.	Operational value
EP-03 Outline, Courses of Study	Includes outlines of available programs and courses of study. Excludes: Home Schooling SEE: EP-05	School/Originating Department	5yrs	Operational value

Record Series	Scope Notes (Description)	Responsible Department	Retention/Notes	Retention Value
EP-04 Library Management/ Learning Commons	Includes records related to board and school library/learning commons operations. Records include collection inventories, correspondence, acquisition and disposal planning and strategies, and other records related to library holdings and operations.	School/Originating Department	5yrs	Operational Value
EP-05 Optional or Alternate Programing	Records include information on the development, administration, and management of programs such as home schooling, Registered Apprenticeship Program (RAP), work experience, locally developed programs, languages, FMNI, religious instruction, etc. Excludes: Student records. SEE: SI-01	Originating Department	10yrs	Operational Value. Not specified 81, 88, 89
EP-06 Locally Developed Courses	Includes proposals, correspondence and curriculum development materials.	Originating Department	5yrs after Termination of the program.	15, 16, 17, 18, 19, 20, 21
EP-07 Assessments and Testing				
FA Finance and Accounting	The function of managing board and 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.			
FA-01 Accounts Payable	Includes records documenting funds payable such as legal fees, trustee and employee expenses, procurement credit card (P-Card) payment, vendor transaction listings, payment vouchers, cheque requisitions, gas, hydro and phone bills, petty cash disbursements and supporting documentation.	Finance	7yrs	37, 42, 45, 46, 47, 53, 69, 70, 71, 72, 73
FA-02 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	7yrs	37, 42, 45, 46, 47, 53, 69, 70, 71, 72, 73
FA-03 Audits - Financial	Includes records regarding internal and external financial audits of accounts. Also includes records regarding tax audits of Goods and Services Tax (GST) conducted by the Federal Government and other external auditors and internal auditors, such as working papers, audit reports and post audit correspondence. Excludes: Non-financial Audits	Finance	10yrs	37, 42, 43, 44, 45, 46, 47, 48, 51, 52, 53
FA-04 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	7yrs	37, 42, 45, 46, 47, 53, 69, 70, 71, 72, 73, 222

Record Series	Scope Notes (Description)	Responsible Department	Retention/Notes	Retention Value
FA-05 Budgets	Includes records pertaining to departmental and board budgets, both capital and operating and supporting documentation.	Originating Dept.	7yrs	Operational Value
FA-06 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	7yrs after End of year of the project's completion.	37, 42, 45, 46, 47, 53, 69, 70, 71, 72, 73, 149
FA-06 Capital Revenue	Includes records related to capital revenue from sale of property and rental income from leased premises and other sources	Finance	7yrs after End of year of the completion of sale	37, 42, 45, 46, 47, 53, 69, 70, 71, 72, 73, 146
FA-08 Cost Allocations	Includes records relating to allocation of tuition and other costs between school boards/authorities, correspondence, reports and related supporting documentation.	Finance	7yrs	Operational Value
FA-09 Financial Forecasts and Reports	Includes records relating to general ledger (GL) balancing, including GL reports, variance reports, yearly schedule, and variance report changes, financial and economic planning and analysis of various financial issues such as revenue analysis, tax, GST, planning and analysis and related correspondence.	Finance	7yrs	37, 42, 45, 46, 47, 53, 65, 66, 68, 69, 70, 71, 72, 73
FA-10-01 Financial Statements - Working/Backup Documentation	Includes records associated with the development of financial statements.	Finance	7yrs	42, 94, 181
FA-10-01 Financial Statements – Final	Includes records regarding the final, signed, Board approved year-end financial statements and final statements.	Finance	Do Not Destroy	42, 45, 46, 47, 53, 55, 69, 70, 71, 72, 73, 181
FA-11 Funding	Includes records related to funding from both government and other sources. Excludes: Agreements and Contracts SEE: LE Series; Excludes Fees and Fundraising: SEE FA-12 and FA-13	Originating	7yrs	42, 69, 70, 71, 72, 73, 90, 94
FA-12 Fees	Includes records regarding fee collection and fund raising by schools and/or district such as school fees, fee collection and supporting documentation (may also include funds allocated to or raised by the student council) Excludes: Agreements and Contracts SEE: LE Series Excludes Funding and Fundraising: FA-11 and FA-13	Originating	7yrs	42, 69, 70, 71, 72, 73, 90, 94
FA-13 Fundraising: Charitable Organizations	Includes records regarding the raising of funds for charitable organizations (completed contribution forms, promotional materials and reports); Excludes Funding and Fees: SEE FA-11 and FA-12	Originating	7yrs	90, 94
FA-14-01 Inventory Control: Capital Asset	Records relating to capital assets valued over \$5000 that will have depreciating value, including asset listings, depreciation details, asset transfer information, and details of extraordinary entries.	Finance	10yrs after disposal of asset	69, 70, 71, 72, 73, 158

Record Series	Scope Notes (Description)	Responsible Department	Retention/Notes	Retention Value
FA-14-02 Inventory Control: Non-capital Assets	Records relating to non-fixed assets valued under \$5000, including inventories of board-/authority-owned equipment. Excludes hazardous materials SDS sheets SEE: HS-04	Originating	7yrs	69, 70, 71, 72, 73, 158
FA-15 Investments	Includes records regarding the board's investments, term deposits and promissory notes, investment portfolios, pooling, adjustments, status reports, performance reports, investment tickets and supporting documentation, and records regarding debentures and bonds issued (initial issuance of the debenture or bond and records of payments made to investors).	Finance	7yrs after investment matures	42, 45, 46, 47, 53, 69, 70, 71, 72, 73
FA-16 Journal Vouchers and Journal Entries	Includes completed journal voucher forms, input forms, and all background documentation used to substantiate journal entries.	Finance	7yrs	65, 66, 68, 78
FA-17-01 General Ledgers	Includes all records in the books of original entry.	Finance	Do Not Destroy Work Group is reviewing concern with the amount of space required to keep the GL as a permanent record	55, 206
FA-17-02 Subsidiary Ledgers, Registers 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	Do Not Destroy Work group is reviewing the need to keep payroll registers for a longer period.	202, 203, 204, 205
FA-18 Enrolment Reporting	Includes all counts and projections documenting enrolments of students in the school system and statistical reports required by Alberta Education as part of the funding process for the preparation of educational statistics.	Finance	7yrs	Operational Value
FA-19 Pension Contributions/ Support	Includes contribution cards detailing pension and benefits obligations due to retired employees and other annuity or superannuation plans (TPP). Includes payroll records required to determine and verify pension payments	Finance	10yrs after pension is paid out to all beneficiaries.	3, 4, 5, 6, 7, 8, 9, 10, 11, 75, 104, 105, 191, 192, 202, 203, 204, 205, 219, 220
FA-20 Purchasing	Includes records regarding the purchase of goods and services; 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 or Facilities	7yrs	28, 38, 39, 40, 41, 43, 65, 66, 68, 69, 70, 71, 72, 73
FA-21 Tax Returns	Records relating to federal and provincial tax returns, property and goods and services taxes, charity information returns, assessments, receipts, details and supporting documentation.	Finance	10yrs	42, 43, 44, 45, 46, 47, 48, 51, 52, 53, 65, 66, 67, 68, 69, 70, 71, 72, 73, 78, 90, 129, 130, 131, 132, 133, 134, 135

Record Series	Scope Notes (Description)	Responsible Department	Retention/Notes	Retention Value
FM Facilities Management	The function of managing and maintaining board and school authority buildings and 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			
FM-01 Building and Site Approvals	Includes documentation such as site plan approvals, building permits and 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	10yrs after Disposal of property	Operational value & Legal Value, 146, 169
FM-02-01 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 elevator logs, boilers and pressure systems, sanding and salting logs, certificates of inspection, deficiency lists, inspection sheets, condition analysis and reports. Also includes inspections of major systems, playground equipment inspections logs, chemical treatment log, playground inspections, physical education equipment inspections, technical program equipment, etc. Excludes: Emergency power systems inspections and testing, fire extinguisher testing, fire protection systems testing. SEE: FM-02-02 Excludes: Health and Safety logs and inspection reports SEE: HS-02 Series Excludes: Air Quality Reports SEE: HS-07	Facilities	6 yrs*	13, 14, 41, 95, 96, 97, 98, 99, 120, 122, 153, 158, 163, 164
FM-02-02 Inspections Logs and Reports: Fire Protection Systems and Emergency Power Systems	Includes records regarding the inspection and testing of emergency power systems, fire extinguishers and fire protection systems.	Facilities	1yr beyond Life of equipment.	Operational Value
FM-03 Site Specific Projects	Records regarding renovations / restorations and repair to existing board owned facilities, such as reports and studies, inspection and remedial repair work reports, condition survey, design notes, technical specifications, copies of purchase orders, copies of contract documents, progress meetings, and deficiency reports, project review and final drawings and reports. Excludes: Original purchase orders SEE: FA-20 Excludes: Original contract documents SEE: LE Series	Facilities	10yrs after Disposal of property	146, 148, 149
FM-04 Infrastructure, Maintenance and Renewal Projects (IMR)	Includes project records regarding building improvements and supporting documents specific to additions, renovations, and alterations to schools and buildings. Records include drawings, project plans, specifications, meeting minutes, project updates, budgets, etc.	Facilities	10yrs after Disposal of property	146, 148, 149

Record Series	Scope Notes (Description)	Responsible Department	Retention/Notes	Retention Value
FM-05 Facilities - Capital Projects	Records regarding renovations / restorations and repair to existing board owned facilities, such as reports and studies, inspection and remedial repair work reports, condition survey, design notes, technical specifications, copies of purchase orders, copies of contract documents, progress meetings, and deficiency reports, project review and final drawings and reports. Excludes: Original purchase orders SEE: FA-20 Excludes: Original contract documents SEE: LE Series	Facilities	10yrs after Disposal of property	146, 148, 149
FM-06 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	10yrs after Disposal of property	146, 148, 149
FM-07 Facilities Planning	Includes records regarding the allocation of classroom and workspace to staff and students. Records include correspondence, proposed student enrolment studies and reports, facilities use plans, facilities designs and layouts, furniture layouts, etc.	Facilities	5yrs after project completion. Note some records may be crossfiled in RP	Operational Value
FM-08 Land Surveys	Includes land survey information such as legal property surveys, construction layout and control surveys, and field notes.	Facilities	10yrs after Disposal of property	1, 2, 146
FM-09-01 Maintenance and Operations – General	Includes records regarding maintenance of Board owned facilities, such as maintenance and repair requirements and arrangements, service work orders and schedules. Excludes: Fixed Asset maintenance and operations SEE: FM-09-02	Facilities	5yrs	Operational Value
FM-09-02 Maintenance and Operations: Buildings/Physical Plant and Equipment	Includes records related to support the maintenance and operations of buildings, physical plant and equipment. Includes office equipment, work orders for fixed assets and supporting documentation.	Facilities	5yrs	Operational Value; Not specified 158
FM-09-03 Maintenance and Operations: Grounds	Maintenance requisitions, work orders, logs and reports showing action taken re grounds keeping, snow clearance, and cleaning.	Facilities	5yrs	Operational Value
FM-09-04 Maintenance and Operations: Pesticides	Maintenance requisitions, work orders, logs and reports on pesticide application.	Facilities	5yrs	159
FM-10 Facility Bookings	Records of bookings issued by the board for the use of school property.	Originating dept.	2yrs	Not specified, 169, 146, Operational Value
FM-11 Physical Security	Includes records regarding the security of office and school facilities and properties, including transportation, such as control of keys, trespassing, surveillance reports, sign in and sign out logs, etc.	Originating dept./Facilities	5yrs	Operational Value
HR (FA)-17-02 Payroll GL Distribution	Linked into Finance Records. (within FA-17-02 Subsidiary Ledgers, Registers and Journals)		Do Not Destroy <i>Work group is reviewing the need to keep payroll registers for a longer period.</i>	

Record Series	Scope Notes (Description)	Responsible Department	Retention/Notes	Retention Value
HR (FA)-17-02 Payroll Registers - ANNUAL	Link into Finance Records. (within FA-17-02 Subsidiary Ledgers, Registers and Journals)		Do Not Destroy <i>Work group is reviewing the need to keep payroll registers for a longer period.</i>	
HR (FA)-17-02 Payroll Registers MONTHLY	Link into Finance Records. (within FA-17-02 Subsidiary Ledgers, Registers and Journals) <i>formerly 22700</i>		Do Not Destroy <i>Work group is reviewing the need to keep payroll registers for a longer period.</i>	
HR Human Resources	The function of managing all employees 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), and conditions of work, overtime, salary rates, pensions, benefits, payroll records, grievances, performance evaluations and recruitment.			
HR-01 Leaves & Attendance Reporting	Includes records regarding the management of employee attendance, absences (leaves and sabbaticals) and vacations. Records include details about vacation schedules, hours of work, absenteeism reports and related reports from electronic systems. Excludes: Individual employee time management SEE: HR-02 <i>formerly 23010</i>	Human Resources	10yrs	112, 113
HR-02 Benefits Administration	Includes records regarding the administration of benefits. Records may include brochures, rates, quotes, correspondence and explanatory documents regarding benefits offered to employees such as group insurance, dental plans, employee assistance program. Excludes: Individual Employee Benefit SEE: HR-07-01 <i>formerly 23020</i>	Human Resources	3yrs after contract lapses or records are superseded	139
HR-03 Grievances, Union and Labour Relations	Includes records regarding grievances filed by employees, such as evaluation reports, notifications, correspondence with unions concerning grievance initiators, and legal opinions, the administration and interpretation of the board's collective agreements and includes seniority lists, implementation plans, records related to collective bargaining, and original documents concerning the certification of Labour unions.e.g., final offers, memoranda of settlement, mediations, arbitrations used in preparation for bargaining, relationship and contact with management exempt staff associations and supporting documentation. <i>Formerly 23040, 23036, 23035</i> Excludes actual collective agreements. See LE-05-03	Human Resources	5yrs after Date collective agreement expires or settlement of grievance/arbitration/expiration of the appeal.	76, 82, 83, 114, 141, 142, 143
HR-04 Staff Records -	Includes records regarding the employment history of the board employees. <i>Formerly 23030</i>	Human Resources	10yrs after termination of employment, or 85 yrs after date of birth, whichever is greater.	4, 6, 36, 37, 38, 39, 40, 74, 85, 104, 105, 108, 110, 114, 117, 119, 139, 125, 136, 154, 155, 177, 207, 208, 209, 210, 212, 213, 214, 215, 216, 219, 220

Record Series	Scope Notes (Description)	Responsible Department	Retention/Notes	Retention Value
HR-05 Recruitment and Hiring	Includes records regarding the administration of a specific competition such as requisitions, copies of advertisements, evaluation criteria, career fairs records and blank interview guides. <i>Formerly 23060, 23062, 23064. NOTE: Unsolicited resumes are considered transitory.</i>	Human Resources	3yrs	Operational Value
HR-06 Staff Surveys	Includes surveys and research conducted on board staff regarding issues and planning that affect them (exit surveys, voluntary intent surveys, management surveys, ASBA compensation surveys). <i>Formerly 23025</i>	Human Resource	3yrs	Operational Value
HR-07 Staff Lists	Includes all report listings concerning staff, e.g., staff directories, seniority lists, retirement lists and lists of supply teachers. Excludes: Emergency Call Out Lists SEE: HS-05	Human Resources	1yr after superseded.	Operational Value. Not Specified 84, 87.
HR-08 Evaluation Templates	Includes templates for records regarding evaluation of an employees' performance, such as reviews by supervisors, performance development process forms, commendations, disciplinary, performance and non-medical counselling notes and supporting documentation. NOTE: individual evaluations are contained in the employee file. SEE HR-04	Human Resources	1yr after superseded.	Operational Value, Not specified 155, 177
HR-09 Job Descriptions	Includes job descriptions and specifications as well as background information used in their preparation or amendment and positions of responsibility. <i>Formerly 23070</i>	Human Resource	5yrs	Operational Value
HR-10 Employee Training Programs & Professional Development	Includes records regarding various internal and external training and education programs offered to employees. <i>Formerly 23080</i>	Human Resource	5yrs after Termination of employment	Operational Value. 81, 84, 87
HR-11 Staff Awards & Recognition	Includes records relating to special recognition and awards presented to staff.	HR	Do Not Destroy	Operational Value
HR-12 Payroll Administration – Attendance & Timesheets	Generated by employee-entered information in Payroll system. Includes: Records regarding allocation and distribution of labour, such as timesheets, Employee Attendance records cards, vacation / lieu time requests, overtime banked, statutory holidays banked, time, relief pay, daily pay sheets, sickness and accident (S&A), off/on duty report payroll adjustment, time input forms (overtime paid, stand-by, relief authorizations, car allowance claims, shift change, time sheets, statutory holiday paid) wage paid / holiday advance requests, Electronic timesheets (E-timesheets) and supporting documentation. <i>Formerly 22710</i> Excludes: Administration of attendance SEE: HR-01	Human Resources	10yrs	36, 37, 38, 39, 40, 69, 70, 71, 72, 73, 75, 91, 107, 109, 111, 112, 113, 115, 116, 118, 202, 203, 204, 205
HR-12-02 Experience Calculation Sheets	Experience Calculation Sheets		10yrs after termination of employment, or 85 yrs after date of birth, whichever is greater.	

Record Series	Scope Notes (Description)	Responsible Department	Retention/Notes	Retention Value
HR-13 Payroll Administration – Deductions	Includes documentation for staff deductions, including , CSB, union dues, EI, garnishees, teacherage rent, RRSPs, etc. formerly 22720	HR	10yrs after Final payout of the pension or date pension records are transferred to pension authority (e.g. LAPP or ATRF)	
HR-14 Payroll Administration - Pension	Includes records regarding the administration of pensions such as plan documents, deduction registers, and prior service summary reports, records of decisions, annual/tri-annual evaluations, remittances and reconciliations. Also includes records regarding pension policy decisions. <i>Formerly 23020</i> Excludes: Employee specific pension information SEE: HR-07	HR	Do Not Destroy*	3, 5, 7, 8, 9, 10, 11, 69, 70, 71, 72, 73, 104, 105, 107, 219, 220
HR-15-01 Payroll Administration - Salary Calendars	Includes records documenting divisional calendars. . <i>Formerly 22702</i>	HR	Do Not Destroy*	Operational Value. 36, 37, 38, 39, 40, 69, 70, 71, 72, 73, 75, 91, 107, 109, 111, 112, 113, 115, 116, 118, 202, 203, 204, 205
HR-15-02 Payroll Administration - Salary Grids & Compensation Rates	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. <i>Formerly 22702, 22703, 22704, 22705, 22706</i>	HR	10yrs	Operational Value. 36, 37, 38, 39, 40, 69, 70, 71, 72, 73, 75, 91, 107, 109, 111, 112, 113, 115, 116, 118, 202, 203, 204, 205
HS Health and Safety	The function of promoting health and safety, and encouraging attitudes and methods that will lead to improved wellness in the jurisdiction.			
HS-01 Health and Safety Programs	Includes: Records regarding the development, objectives and administration of safety programs, program audits, guidelines and compliance and statistics.	Health & Safety	short	Operational Value. Not specified 153, 157
HS-02-01 Health and Safety - Audits	Includes records regarding health and safety audits and inspections.	Health & Safety or Originating	3yrs Note: Depending on the nature of an incident, records may have legal value. Special circumstances might affect the retention of some inspections (e.g., fire code inspections, or machinery inspections, or playground inspections.)	153, 157; 24, 25, 69, 117, 121, 122, 123, 129, 153, 225, 226: http://work.alberta.ca/occupational-health-safety/cor-maintain-or-renew-a-certificate.html

Record Series	Scope Notes (Description)	Responsible Department	Retention/Notes	Retention Value
HS-02-02 Inspections & Inspection Reports	Includes records of inspections carried out in accordance with the Occupational Health and Safety Act.	Health and Safety	3 yrs Special circumstances might affect the retention of some inspections (e.g., fire code inspections, or machinery inspections, or playground inspections.)	24, 25, 69, 117, 121, 122, 123, 129, 153, 225, 226
HS-03 Incident Reports	Includes completed forms reporting an incident. Excludes Individual student and employee medical health records (personally identifiable records) See: HR and ST series	Health & Safety or Originating	3yrs Incident reports relating to a WCB claim may be retained with WCB in LE-04.	12, 66, 70, 89, 136, 153, 155, 157
HS-04 Safety Data Sheets	Includes safety data sheets (SDS) as created and issued by the manufacturer. Note: Safety data sheets are not records of the board, however every location that uses the material must have access to a data sheet, as required by OH&S Act.	Facilities	short - The "name" of Material Safety Data Sheets (MSDS) has formally changed to Safety Data Sheets (SDS).	Operational Value. Not specified 150
HS-05 Emergency Plans	Includes records regarding emergencies and related plans to support the board and school in case of fire or other emergencies. I.e. municipal emergency plans, business continuity plans, call lists, supplier/vendor contacts, and related reports.	School/Facilities/Health and Safety	5yrs	12, 13, 14, 41, 54, 120, 122
HS-06 Designated Substances and Hazardous Materials Management	Includes records related to the monitoring, management and disposal of chemical, biological or physical agents or substances.	Facilities/Health and Safety	5yrs	12, 13, 14, 41, 49, 50, 54, 120, 121, 122, 153, 156, 157, 197, 198, 199, 200, 223
HS-07 Air Quality, Asbestos/Mold removal and containment	Includes records regarding renovation or removal projects on jurisdiction owned facilities containing asbestos/mold. Records include clearance documentation, regarding the removal of asbestos, air quality testing, asbestos removal consulting and removal report, asbestos audit testing, industrial waste receipt and supporting documentation.	Facilities/Health and Safety	12yrs after Disposal of property	OHSC Section 26; Limitations Act C L-15.1 s3
IM Information Management	The function of applying and managing information and communications technology to support the business needs of the organization. Also includes the management of information and the appropriate decommission of systems and disposition of information.			
IM-00	Link to Technology Committee			
IM-00	Link to Tech Vehicle Records		1yr beyond Life of Vehicle. Primary location for these asset documents falls under FA-14 Series. Primary location for insurance documents falls under LE-07	

Record Series	Scope Notes (Description)	Responsible Department	Retention/Notes	Retention Value
IM-00	Link to Tech/Software Agreements			
IM-01 Archives	Includes records regarding schools and service units that have transferred records to the Archives; archival donations from external sources; and artifacts and cultural properties from the Board of Trustee's Office. Documentation includes information regarding the records received, accession and de-accession records / registers, organizational updates, box contents listings, donor forms, and supporting documentation	Records Management	Do Not Destroy (3 months after Expiration of time limited by s. 33.1 for appeal)	20
IM-02-01 Records Management Administration	Includes records regarding the development, maintenance, and updating of records management program system documentation. May include records regarding the administration of the records management system such as inventory, lists, location and warehouse information, vendor contact and supplies information, scheduling and supporting documentation. Excludes Records Management Disposition Authorizations: SEE IM-02-03 Excludes: Records Management Retention Schedules: SEE IM-02-04	Records Management	Short - Superseded or obsolete	Operational Value 146
IM-02-02 Records Management – Transfer and Retrieval	Includes records regarding the transfer of custody and control of records from service units and schools to the records management system or to other jurisdictions. Records include: transmittals, requests for retrieval/return of records. Also includes student request /authorization and supporting documentation. Excludes Transfer of Documentation for Sale of Property	Records Management	medium	Not specified
IM-02-03 Records Management – Retention Schedules & Disposition Authorization	Records include all histories and versions of approved system documentation, records regarding authorization of records disposition, as well as requests to suspend disposition (holds). Includes signed disposition forms and accompanying transmittals; documentation accounting for officially missing records; hold authorizations; attachments and supporting documentation. NOTE: current Retention Schedule is available as part of Admin Procedures (CG-06-04)	Records Management	1 yr after Dissolution of Corporation	Not specified
IM-03-01 Freedom of Information and Protection of Privacy – (FOIP) Requests and Replies	Includes records regarding requests for information under the Province's legislation, such as applications, correspondence and copies of material released Retain for E+7. E=Closure of request	Legal	7yrs after request is closed	Operational Value
IM-03-02 Freedom of Information and Protection of Privacy (FOIP) – Personal Information Banks (PIB's)	Includes records regarding directories of personal information banks (PIB's) and supporting documentation. (A personal information bank lists the type of personal information held by a public body.) Retain for E+1. E=Record is superceded or obsolete. A personal information bank does not provide direct access to an individual's records. <td>Legal</td> <td>short</td> <td>Operational Value</td>	Legal	short	Operational Value
IM-03-03 Freedom of Information and Protection of Privacy (FOIP) - Privacy Impact Assessments (PIA's)	Includes records regarding completed privacy impact assessments (PIA) and related documentation. Retain for E+3. E=Record is superceded or obsolete.	Legal	3yrs after obsolete or superseded	Operational Value

Record Series	Scope Notes (Description)	Responsible Department	Retention/Notes	Retention Value
IM-03-04 Freedom of Information and Protection of Privacy (FOIP) - Statistics	Includes records regarding statistical reporting of Freedom of Information and Protection of Privacy requests to the Province	Legal	3yrs	Operational Value
IM-03-05 Freedom of Information and Protection of Privacy (FOIP) - Investigations	Includes: Records regarding documents and reports concerning investigation of privacy breaches. Retain for E+7. E=Closure of investigation	Legal	7yrs after completion of final report	Operational Value
IM-04 Telecommunications Systems	Records relating to the management, maintenance and use of telecommunications including landline and wireless mobile devices and equipment. Includes system documentation, configuration details and services provided	Information Technology Services	3yrs after life of the system	Operational Value
IM-05-01 Information Technology - Helpdesk	Includes records regarding the performance of typical daily helpdesk functions for the district. Records include helpdesk submissions background documentation submitted by the user, scripts used by the helpdesk to respond to inquiries. NOTE: Records may be escalated to IM -05-02	Information Technology Services	Not stored on DocuShare; transitory records.	Operational Value
IM-05-02 information Technology – Maintenance and Support	Includes records regarding system maintenance and support, such as change requests, system statistics, information and reports, hardware / software checks and testing. Also includes software upgrades, problem management and database change requests. e excludes: IT helpdesk functions See: IM-05-01	Information Technology Service	3yrs past Life of System	Operational Value
IM-05-03 information Technology – Functional, Technical Specifications	Includes records regarding systems development functional and technical specifications and requirements, such as background requests, requirement definitions, studies, surveys, stakeholder engagement information and business cases used to design/develop software/hardware specifications. Also includes acceptance/compatibility criteria, modeling, final specifications and supporting documentation	Information Technology Services	3yrs past Life of System	Operational Value
IM-05-04 Information Technology – Installation and Implementation	Includes records regarding system installation / implementation, such as data conversion plans, copies of agreements with third parties, mapping information and implementation plans.	Information Technology Services	3yrs past Life of System	Operational Value
IM-05-05 Information Technology – Plan	Includes records regarding the comprehensive framework used to manage and align an organization's Information Technology (IT) assets, operations, and projects with its operational characteristics, defining how information technology will support the district's operations.	Information Technology Services	9yrs after absolutete or superceded.	Operational Value
IM-05-06 information Technology – System, Server, Network Monitoring	Includes records regarding the management and monitoring of system / server network environment, such as performance statistics, configurations, performance benchmarks, job scheduling, installations, etc.	information Technology Services	Not stored on DocuShare; transitory records.	Operational Value

Record Series	Scope Notes (Description)	Responsible Department	Retention/Notes	Retention Value
IM-05-07 Information Technology - Information Security	Includes records pertaining to the protection of information and information systems from unauthorized access, use, infection from viruses, disclosure, disruption, modification, perusal, inspection, recording or destruction in accordance with confidentiality, integrity and availability requirements. Excludes: physical security SEE: FM-11	Information Technology Services	short	Operational Value
IM-05-08 Information Systems - Administration	Records relating to the design of computer systems and/or software, including needs assessments, business cases, project charter, process flowchart documentation, impact analysis, 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. May also include requests for significant modification, fixes and upgrades	Information Technology Services	2yrs after Life of the system	Operational Value
IM-06 Access Control and Password Records	Records related to the management of and access to programs. Includes individual access, password management, etc.	Information Technology Service	1yr past date of Termination of employee.	Operational Value
IM-07-01 Web Administration	Includes: Web management and operations records that provide context related to the site such as administrative and technical records necessary for or produced during the management of a web site.	Communication	3yrs after life of the website	Operational Value
LE Legal	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, harassments incidents, etc.		Boards may wish to establish a longer retention for compliance.	Boards may wish to establish a longer retention for compliance.
LE-01-01 Accident/Incident Claims and Reports	Includes reports related to student/employee accidents that occur on board and school 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 Excludes: claims/ litigations, WCB claims/ reports SEE: LE-03 <i>Formerly 20035</i>	Originating location or corporate office keeps student accidents; all others kept at corporate office	E = Last action taken that advances claim.	79, 80, 154, 209, 211
LE-01-02 Incidents - Discrimination and Harassment	Includes records of incidents involving staff and students, incident reports, investigations, and correspondence regarding these issues. Excludes: appeals/hearings SEE: LE-03	Originating Department	E = date of lapse, suspension or cancellation	79, 80, 170, 193, 194
LE-02 Legal Opinions/ Precedents	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 <i>Formerly 15100</i>	Corporate/ Legal	E = completion of issue.	Operational value

Record Series	Scope Notes (Description)	Responsible Department	Retention/Notes	Retention Value
LE-03 Appeals/Hearings/Claims/Litigation	Includes records of hearings conducted with regard to issues that affect the school or school board and all liability claims and litigation against or entered into by the boards/authorities and schools. Records include correspondence, reports, discovery findings, hearing proceedings, final decisions, reports, correspondence, investigations, WCB claims, etc. <i>Formerly 15200</i>	Corporate/Legal	E = Last action taken that advances claim.	79, 80, 82, 83, 161, 162, 170, 194, 195, 196, 215
LE-04 Joint Use Agreements and Partnerships	Correspondence and information related to joint use agreements and partnerships. Excludes minutes from joint use committee meetings; SEE CG-03 <i>Formerly 1020</i> . <i>NOTE: Agreements relating to specific projects should be cross-filed with that project's records.</i>	Corporate/ Legal	1yr after Dissolution of the corporation. Agreements relating to specific projects should be cross-filed with that project's records.	
LE-05-01 Contracts and Agreements - General	Correspondence and information related to contracts and agreements. Excludes Joint Use, Human Resources, Educational, and Governance agreements. <i>Note: Agreements relating to specific projects should be cross-filed with that project's records. Formerly 10200 NOTE: Agreements relating to specific projects should be cross-filed with that project's records.</i>	Corporate/ Legal	E = contract lapses	
LE-05-02 Contracts and Agreements – Human Resources	Includes records regarding employee related contracts, such as employment contracts, retirement agreements, etc. which may also contain memos and affidavits of execution and supporting documentation <i>Formerly 10200</i>	Human Resources	E = contract lapses	
LE-05-03 Contracts and Agreements – Educational	Includes records regarding educational related agreements, such as cooperative education agreements, work experience agreements. Excludes: agreements related to employment SEE: LE-05-02 Excludes: agreements related to land SEE: LE-10 series <i>Formerly 10200</i>	Corporate/Legal	E = contract lapses	
LE-05-04 Contracts and Agreements – Governance	Includes ministerial orders and bylaws. <i>Formerly 10200</i>	Corporate/Legal	E = Dissolution of the corporation	
LE-06 Insurance Policies	Includes records regarding liability insurance policies held by board such as copies of insurance certificates / policy documents and supporting documentation. Also includes 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. Excludes: insurance claims and accident reports SEE: LE-01 <i>Formerly 20030</i>	Corporate/Legal	Retain for E+2. E = date of serious injury or accident </>	139, 140, 154
LE-07-01 Property - Deeds and Titles	Includes original deeds and land titles for any board owned property.	Corporate/Legal	E = 10 years after sale or disposal of property	144, 146
LE-07-02 Property - Acquisition and Sale	Includes land purchase agreements, development agreements, property appraisals, valuations and quotes concerning land owned by the board and school authority or under consideration for purchase. Also includes plans, correspondence, reports and backup documentation relating to the acquisition or sale of lands.	Corporate/Legal	E = disposal of property.	79, 80, 123, 124, 144, 146

Record Series	Scope Notes (Description)	Responsible Department	Retention/Notes	Retention Value
LE-08 Property – Leasing/Rentals	Includes: Records regarding lease and rental agreements and contracts for land, buildings or property, residential or commercial, by and to the board, such as signed leases, surveys, tenant information, schedules and receipts of payment and supporting documentation <i>Formerly 31670, 31680</i>	Corporate/Legal	Retain for E+6. E=expiry date of contract/agreement </>	144
LE-09 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	12yrs after claim incident/injury occurred, attributable to defendant that warrants bringing proceeding) or E= Claim arose; and other conditions. All reports that escalate to insurance claim must be transferred to LE-01	79, 80, 146
RP Research and Planning	The function of undertaking research 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.		Final reports may be retained longer and/or in applicable department.	Final reports may be retained longer and/or in applicable department.
RP-01 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, population reports, and traffic studies.	Originating Department	1yr after Dissolution of the corporation.	Operational Value
RP-02 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	1 yr after completion of research project	Operational Value
RP-03 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.Retain for 2 Years after the dissolution of the board.<i>Historical Value 	Originating Department	1yr after Dissolution of the corporation.	Operational Value
RP-04 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; external research, applications, surveys and research reports. Retain for 1 year after completion of the research project. 	Originating Department	1 yr after completion of research project	Operational Value
RP-05 External Requests	Includes external applications to conduct research from sources such as universities, graduate students, and foundations, and their final reports	Originating Department	1 yr after completion of research project	Operational Value

Record Series	Scope Notes (Description)	Responsible Department	Retention/Notes	Retention Value
RP-06 Educational and Curriculum Planning	Includes all strategic and operational planning documents, and mandates, related correspondence, background and reference information, records of any research conducted into curriculum or program development, such as questionnaires, interest surveys and independent research studies.	Originating Department	3yrs	Operational Value
RP-07 Divisional Planning	Includes records supporting and final versions of plans for the division, including AERR, etc.			
SI Student Information	The function of providing students with programs and services in accordance with the School Act. Records cover such areas as admissions, transfers and withdrawals, Student Records, guidance and counseling, assessments, consent/ permission forms for special activities and programs, and extra-curriculum programs and participation.			
SI-01 Student Records	Includes all information affecting the decisions made about the education of a student. Includes records specified in the Student Record Regulation. This is a provincial record that may be transferred to another board within Alberta as per the Student Record Regulation. If the student leaves the province the records is copied and the copy set is transferred out of province.	School and Student Information	35 yrs after Date of Birth Note: Schools employing school psychologists should be aware that psychologists are governed by the Health Professionals Act and may have to extend the retentions of those applicable records. CULL FILE: Suspension or expulsion = retain responsive records 3 years from date of incident then Destroy. Note: Alberta Education has custody and control of Provincial standardized test results	136, 165, 166, 172, 175, 177, 184, 185, 186, 187, 188, 189
SI-01-02 Home School Students	Includes student-specific records pertaining to home school students. NOTE: crossfiled in SI-06 Student Records.	School and Student Information	Same as Student Records	136, 165, 166, 172, 175, 177, 184, 185, 186, 187, 188, 189

Record Series	Scope Notes (Description)	Responsible Department	Retention/Notes	Retention Value
SI-01-03 International Students	Includes student-specific records pertaining to out of country students applying to attend schools. Records may include applications for admission, correspondence between the student's family and the International Bureau (Global Learning). May include copies of Government of Canada Embassy information, copies of Visa student permits, banking information and copies of educational reporting while student in attendance at a school. Excludes: Student Record file SEE: SI-06 NOTE: crossfiled in SI-06 Student Records.	School and Student Information	Same as Student Records	136, 165, 166, 172, 175, 177, 184, 185, 186, 187, 188, 189
SI-01-04 Student Record Transfer Administration (CUM Files requests)	Includes all office records, binders and student transfer logs that administer the transfer of students in and out of individual school. These contain personal information, as well as retirement/transfer information on individual students, which is available for immediate access and as backup information. This may be retained electronically if a hard copy can be readily produced.	School	3yrs from transfer date. Store with the Student Record files of students who have moved/transferred	186, 189
SI-02 Bursaries and Awards	Includes supporting documentation regarding bursaries and awards presented to students at commencement or graduation. Financial records regarding awards should be retained in appropriate record series in Finance. SEE FA series.	School/Originating Department	10yrs	Operational Value
SI-03 Preliminary Assessment/ Accommodation	Includes records used prior to a formal assessment, if required. Records may include anecdotal notes, accommodations and interventions used prior to formal assessments and supporting documentation. NOTE: Any documentation that is not deemed transitory should be filed in the Non-Transferred or Learning Services sections of the student's record (SI-06).	School	???	92, 93
SI-04 Case Files: Counselling	Includes case files of students who are referred for counseling. Records include referrals, reports, and case notes, authorization and counseling working documents, testing and test keys and supporting documentation. Not to be kept as part of the Student Record.	School Counselors/ Originating Department	1 yr after student leaves the school	Not specified 88, 89, 136, 155, 172, 177, 184, 18SI-025, 186, S 187, 188
SI-05 Specialized Assessment - Working Notes	Includes case files referencing students referred for a specialized assessment which may include but is not limited to psychological, learning, speech language, occupational, physical therapy, vision, hearing assessments, testing protocols, authorizations and supporting documentation. Final reports resulting from assessments are placed in the Student Record file.	School/ Originating Department	???. E = Once student leaves the school E2 = Date of Birth Case files are maintained in accordance with Health Care Professional guidelines.	Not specified 88, 89, 136, 155
SI-07 Programs: Co-operative Education	Includes correspondence with potential employers, surveys, and monthly monitoring teacher reports, statistics and other records of co-operative education programs. Also includes dual-credit, apprenticeship programs. Excludes: Work Education Agreements SEE: LE-05-03 Excludes: Educational program administration and planning documents. SEE EP Series.	School/Originating Department	3yrs	81, 120, 195, 233, 234, 235

Record Series	Scope Notes (Description)	Responsible Department	Retention/Notes	Retention Value
SI-08-01 Student Activity Administration	Includes records regarding the administration of student exchanges, off site activity, field trips and arrangements for special events related to specific activities, such as concerts, festivals, track meets, facility tours, tournaments, art or essay contests, and science fairs. Records include correspondence, plans, schedules, etc. Excludes: consent forms SEE: SI-08-02 Formerly 42300, 50200	School	2 yrs. Records may be retained for longer periods if deemed to be of historical value OR if the activity is deemed "high-risk."	236
SI-08-02 Student Activity Participation	Includes requests, consent/permission forms, acknowledgement of risk, correspondence and reports regarding school field trips, on and off site activities, sports teams, working in school laboratories (labs) such as science labs. Also includes reports relating to the student(s) involved in student exchanges. Excludes: Information on international students and host families SEE SI-01. Formerly 50200	School	2yrs after date consent received. Subject to select inclusion in the ST-11 International Hosting and Exchange series dependent on the trip. Records may be retained for longer periods if the activity is deemed "high-risk."	236
SI-09 Registers: Student Enrolment, Attendance and Audits	Includes registers and reports concerning the enrolment/attendance of students, recording of daily attendance, daily absence reports and audit documentation, including enrolment reports, priority school, duplicate course marks, home schooling, course funding, etc. Also includes class registers for non-school system programs such as continuing education, driver education and heritage language programs.	School Principal	7yrs	Not specified 93
SI-10 Student Marks	Includes information on students' courses completed, marks received, mark verification sheets, teacher mark books and verifications from Alberta Education. Also includes electronic records. Excludes: report cards SEE: SI-06	School Teaching	- 2 yrs after Verification in SIRS. Note: Student Marks are included in the SI-01 series as part of the report card. On closure of school, forward record for student to new school or minister if school unknown	182, 165
SI-11 International Students - Hosting and Exchange Programs	includes correspondence and records of international hosting programs including documentation on host families, police clearances for host families, minutes of meetings for agent information and supporting documentation to pursue opportunities to bring international students to schools	Originating Department	10yrs	Operational Value
TR Transportation	The function of providing students with transportation.			
TR-00 Transportation Administration	Includes records relating to procedures, liaison/correspondence, STAA, ASTAC, and the general administration of the transportation services department	Transportation Services	3yrs	Operational Value

Record Series	Scope Notes (Description)	Responsible Department	Retention/Notes	Retention Value
TR-01 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. Excludes: Student Bus Services SEE: TR-02	Transportation Services	10yrs	Operational Value
TR-02 Grants	Includes transportation grant applications and supporting documentation.	Transportation Services/Finance	7 yrs. Note: Funding manual is updated annually. Need to add citation to list	244
TR-03 Staff Records (Link to personnel records)	Includes driver licensing, abstracts, training, certifications, route or bus applications, medicals. Also includes link to transportation job postings and recruitment records	Human Resources	10yrs after last date of employment or 85yrs after birth year, whichever is greater.	239
TR-04 Bus Drivers - Logs	Daily logs.	Transportation Services	Not stored on DocuShare; transitory records (6 month retention)	237,238
TR-05 Vehicle - Records (These may be filed by unit number for each vehicle.	Includes information relating to the vehicle, insurance and registration, copies of purchase invoice, bill of sale, vehicle specifications, modification records (i.e. wheelchair lift installation), maintenance logs, records pertaining to work performed for upkeep of vehicle, accident reports, repairs, and insurance communication. Excludes: Vehicle inspections. SEE TR-05-03	Transportation Services	1yr beyond Life of Vehicle. Primary location for these asset documents falls under FA-14 Series. Primary location for insurance documents falls under LE-07	238, 239, 240, 241
TR-05-01 Vehicle - Transportation Insurance	Link to Transportation Insurance		Link only	
TR-05-02 Vehicle Accident Reports	Link to Vehicle Accident Reports		Link only	
TR-05-03 Vehicle - Inspections	Includes daily and monthly trip inspection reports. NOTE – if retention is kept at recommended 6 months, these records will not be scanned for DocuShare storage. Placeholder will be created in DS to facilitate future changes.	Transportation Services	6 months. Considered transitory and would not be stored in DocuShare.	237,238, 242,
TR-06 Routes	Includes route maps, ECS routes, extra service runs, temporary alternate routes, route optimization, bus passenger lists, route maintenance requests.	Transportation Services	3yrs	Operational Value
TR-07 Student Bus Services	Includes records concerning transportation/bussing for transportation of students to and from schools, Special Education, off site activities, field trips, and special programs. Records include bus schedules, requests for transportation, bus routes, boundaries and student lists (names and addresses). Excludes: transportation bus costs SEE: TR-01	Transportation Services/Schools	3yrs	Operational Value
TR-08 Student Incidents Reports	Documentation relating to behaviour/misconduct. Excludes: Accident reports.		1 yr	245/Operational Value

Record Series	Scope Notes (Description)	Responsible Department	Retention/Notes	Retention Value
TR-09 Requests, Complaints & Appeals	Includes records concerning grievances and complaints or appeals to requested Student Bus Services, such as school of choice appeals, yard service appeals, school bus stop complaints. NOTE: Formal appeal documentation kept in LE-03 and Complaints/Appeals escalated to the Board are crossfiled in CG-12. Includes link to HR-03-02 Grievances.	Transportation Services	1 yr (Formal appeal documentation kept in LE-03)	Operational Value