

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Retention Value
AM	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.	Responsible	Retention	Retention Value
AM-01	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. formerly 11300, 11400, 12101,13200's	Originating Department	Transitory (placeholder on SharePoint)	Not stored on SharePoint; transitory records.
AM-02	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	E+3	3 yrs after committee is dissolved OR the mandate of the committee has been met.
AM-03	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 formerly 12210, 12220, 11305	Originating Department	3 yrs	
AM-04	AM-04 Forms Inventory	Includes records regarding masters/originals of blank hard copy and electronic forms history used by the jurisdiction.	Originating Department	short	Until obsolete or superseded
AM-05	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 Formerly 20050	Originating Department	Transitory (placeholder on SharePoint)	Not stored on SharePoint; transitory records.
AM-06	AM-06 Administrative Business	Includes non-capital project work, records of administrative issues, etc.		5 years	Needs Retention Value
AM-07	AM-07 School Correspondence	Memos and information shared with schools, communication between administration and schools	Originating Department	5 years	Needs Retention Value
CG	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	Responsible	Retention	Retention Value
CG-01	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	E+2	2 years after Dissolution of the corporation
CG-02-01	CG-02-01	Board Meeting Records		E+2	Archival E=Dissolution of the board

CG-02	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. ie, Trustee Visits, Gala, Board workshops, tradeshow, etc. Excludes: Educational Programs, Community Programs, Health and Safety Programs, etc. SEE applicable function series.	Originating Department	E + 3	3 yrs after Program is discontinued.
CG-03-01	CG-03-01 Committees - General	Includes routine committee work such as: school council, ad hoc committees, and task forces. ie, Suspension/discipline committee, ASBA Zone One, Committee, committees struck because of agreements. Records include agendas, minutes, reports, and supporting documentation. <i>formerly 11550	Originating	E + 2	2 yrs after Committee is dissolved or mandate of the committee has been met..
CG-03-02	CG-03-02 Standing Committees (Committees of the Board)	Regular & organizational committees consisting of trustees, created by the board for a specific purpose. ie, 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	E + 2	2 yrs after Committee is dissolved or mandate of the committee has been met..
CG-04	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	short	3 yrs These records are copy sets, but may be kept to ensure continuity of school councils.
CG-05-01	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	Corporate Office	short	3 yrs
CG-06-01	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 superceded or obsolete. <i>formerly 17000	Corporate Office	E + 2	2 yrs after obsolete or superseded. Core records may have archival value and should be moved to CG-06-02 or appropriate archive..
CG-06-02	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	E + 2	2 yrs after Dissolution of the Board
CG-06-03	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. <i>formerly 17000 and all 005s	Corporate Office	E + 2	2 yrs after obsolete or superseded.
CG-06-04	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	E + 2	2 yrs after Dissolution of the Board
CG-07	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	8	8yrs Some correspondence may have long term value.
CG-08	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.	Corporate Office	3	3 yrs May have archival value

CG-09	CG-09 Trustee Management	Includes elections information, declaration of interests, personal information, directories and news items regarding the trustees. Also includes trustees' distribution and orientation information.	Corporate office	E+2	2 yrs after expiry of term of office.
CG-10	CG-10 Elections	Includes records of elections procedures and information. Retain for 5 years <i>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 </i>	Corporate office	5	5 yrs Note: 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
CG-11	CG-11 Information Requests from Trustees	Includes information collected in response to specific requests from trustees. Includes ad hoc requests for information, speaking notes, parent complaints, etc..	Corporate office	E+2	2 yrs after trustee's term of office
CG-12	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	E+1	1yr after Date complaint resolved
CO	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, archeval value publications and reports. Records in this series that have ARCHIVAL VALUE should be flagged as such publications and reports	Responsible	Retention	Retention Value
CO-01	CO-01 Advertisements	Includes publications, artwork and copies of advertisements placed by the board or schools. Excludes: advertisements for job postings. SEE HR-13 Retain for 3 years formerly 16100	Originating Department	3 years	3 years
CO-02	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 Retain for 3 years	Originating Department	3 years	3 years
CO-03	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. Retain for 1 year after record is deemed to have no further value to the school or on school closure. ARCHIVAL VALUE formerly 16600	Originating Department	1 year after record is deemed to have no further value to the school or on school closure, may have Archival documents	1 Year after record is deemed to have no further value to the school or on school closure If document in deemed Archival it should be marked as such
CO-04	CO-04 Momos, Special Events, Presentaitons, Ceremovies 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. Retain for 3 years. ARCHIVAL VALUE	Originating Department	3 Years May have Archival Value	3 Year after record is deemed to have no further value to the school or on school closure If document in deemed Archival it should be marked as such
CO-5	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. Retain for 1yr after record is deemed no further value to the school or on school closure	Originating Department	1 year after record is deemed to have no further value to the school or on school closure	1 year after record is deemed to have no further value to the school or on school closure

CO-06	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. Retain for 1yr after record is deemed no further value to the school or on school closure. ARCHIVAL VALUE formerly 16700	Originating Department	1 year after record is deemed to have no further value to the school or on school closure, may have Archival documents	1 Year after record is deemed to have no further value to the school or on school closure If document in deemed Archival it should be marked as such
CO-07	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		1 year after record is deemed to have no further value to the school or on school closure, may have Archival documents	1 Year after record is deemed to have no further value to the school or on school closure If document in deemed Archival it should be marked as such
CO-08	CO-08 Communications Projects - originating from the Division	Information that is prepared by communications on behalf of the board. Retain for 10 years		E+10	10 years
CO-09	CO-09 Internal Communications	Includes staff announcements, memorandums from executive for divisional staff, etc.		Short	Short Records may be retained for longer periods for historical purposes
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.	Responsible	Retention	Retention Value
EP-01	EP-01 Development and Design	Includes proposals, correspondence and curriculum development materials.	Originating Department	E+5	5yrs after Termination of the program.
EP-02	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). Retain for 5 years after implementation of the program	Originating Department	E+5	5yrs after Implementation of the program.
EP-03	EP-03 Outline, Courses of Study	Includes outlines of available programs and courses of study. Retain for 5 years. formerly Curriculum 41000, 41110, 41120, 41140, 41150 Excludes: Home Schooling SEE: EP-05	School/Originating Department	medium	5yrs
EP-04	EP-04 Instructional Materials Centre, Library management and Learning Commons	Includes records related to board and school library/learning commons/IMC operations. Records include collection inventories, correspondence, acquisition and disposal planning and strategies, and other records related to library operations	School/Originating Department	short	5yrs
EP-05	EP-05 Optional or Alternate	Records include information on the development, administration, and management of programs such as home schooling, Registered Apprenticeship Program (RAP), work experience, languages, FMNI, religious instruction, etc. Excludes: Student records. SEE: SI-01 Retain for 10 years. Note: Specify if records for a specific program requires a longer retention due to legislation pertaining to that program. formerly 43000 Program Delivery	Originating Department	long	10 Years Note: Retention of records for specific programs may be affected by legislations pertaining directly to that program
EP-06	EP-06 Locally Developed Courses	Includes proposals, correspondence and curriculum development materials.	Originating Department	E+5	5yrs after Termination of the program.

EP-07	EP-07 Assessment and Testing	Assessment; Includes Achievement, Diploma, Field, District-Based, Provincial, National, International and Classroom Testing Formerly 44000	Originating Department	short	Review, needs retention
EP-08	EP-08 Learning Support Programs	Includes Project Peace, Peace Collaborative Services, administration of learning support programming.	Originating Department	E+5	5yrs after Termination of the program.
FA	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	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	7	7yrs
FA-02	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	7	7yrs
FA-03	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	10	10yrs
FA-04	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	7	7yrs
FA-05	FA-05 Budgets	Includes records pertaining to departmental and board budgets, both capital and operating and supporting documentation.	Originating Dept.	7	7yrs or Alberta Education requirements
FA-06	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	E+7	7yrs after End of year of the project's completion.
FA-07	FA-07 Capital Revenue	Includes records related to capital revenue from sale of property and rental income from leased premises and other sources	Finance	E+7	7yrs after End of year of the completion of sale
FA-08	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	7	7yrs
FA-09	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	7	7yrs
FA-10-01	FA-10-01 Financial Statements – Final	Includes records regarding the final, signed, Board approved year-end financial statements and final statements.	Finance	P	Do Not Destroy
FA-10-01	FA-10-01 Financial Statements - Working/Backup Documentation	Includes records associated with the development of financial statements.	Finance	7	7yrs
FA-11	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	7	7yrs

FA-12	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	7	7yrs
FA-13	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	7	7yrs
FA-14-01	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	E+10	10yrs after disposal of asset
FA-14-02	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	7	7yrs
FA-15	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	E+7	7yrs after investment matures
FA-16	FA-16 Journal Vouchers and Journal Entries	Includes completed journal voucher forms, input forms, and all background documentation used to substantiate journal entries.	Finance	7	7yrs
FA-17-01	FA-17-01 General Ledgers	Includes all records in the books of original entry.	Finance	P	Do Not Destroy
FA-17-02	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	7 * changed to P	Do Not Destroy NOTE: Payroll registers may be kept longer for operational value.
FA-18	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	7	7yrs
FA-19	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	E+10	10yrs after pension is paid out to all beneficiaries.
FA-20	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	7	7yrs
FA-21	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	10	10yrs
FM	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	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	E+10	10yrs after Disposal of property
FM-02-01	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	6 yrs*
FM-02-02	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	E+1	1yr beyond Life of equipment.
FM-03	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	E + 10	10yrs after Disposal of property
FM-04	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	E + 10	10yrs after Disposal of property
FM-05	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	E + 10	10yrs after Disposal of property
FM-06	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	E + 10	10yrs after Disposal of property
FM-07	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	Short	5yrs after project completion. Note some records may be crossfiled in RP
FM-08	FM-08 Land Surveys	Includes land survey information such as legal property surveys, construction layout and control surveys, and field notes.	Facilities	E + 10	10yrs after Disposal of property
FM-09-01	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	short	5yrs
FM-09-02	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	short	5yrs

FM-09-03	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	short	5yrs
FM-09-04	FM-09-04 Maintenance and Operations: Pesticides	Maintenance requisitions, work orders, logs and reports on pesticide application.	Facilities	5	5yrs
FM-10	FM-10 Facility Bookings	Records of bookings issued by the board for the use of school property.	Originating dept.	short	2yrs
FM-11	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	medium	5yrs
HR	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-00	HR-00 Business Processes	Includes records relating to procedures and the general administration of the Human Resources and payroll Department			
HR-01	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-12 formerly 23010	Human Resources	10	10yrs
HR-02	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 formerly 23020	Human Resources	E + 3	3yrs after contract lapses or records are superseded
HR-03	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. Formerly 23040, 23036, 23035 Excludes actual collective agreements. See LE-05-03	Human Resources	E + 5	5yrs after Date collective agreement expires or settlement of grievance/arbitration/expiration of the appeal.
HR-04	HR-04 Link to Staff Records -	Includes records regarding the employment history of the board employees. Formerly 23030	Human Resources	E + 10	10yrs after termination of employment.
HR-05	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. Formerly 23060, 23062, 23064	Human Resources	3	3 Years *Resume is transferred to employee file upon hiring Note: Unsolicited Resumes are considered transitory"

HR-06	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). Formerly 23025	Human Resource	3	3yrs
HR-07	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	short	1yr after superseded.
HR-08	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	short	1yr after superseded.
HR-09	HR-09 Job Descriptions	Includes job descriptions and specifications as well as background information used in their preparation or amendment and positions of responsibility. Formerly 23070	Human Resource	5	5yrs
HR-10	HR-10 Employee Training Programs & Professional Development	Includes records regarding various internal and external training and education programs offered to employees. Formerly 23080	Human Resource	5	5yrs after Termination of employment
HR-11	HR-11 Staff Awards & Recognition	Includes records relating to special recognition and awards presented to staff. formerly 23015 Permanent Records; historical value	HR	Permanent Records	Do Not Destroy
HR-12	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. Formerly 22710 Excludes: Administration of attendance SEE: HR-01	Human Resources	10	10yrs
HR-12-01	HR-12-01 Attendance and Timesheets	Attendance and Timesheets		10	10 Years
HR-12-02	HR-12-02 Experience Calculation Sheets	Experience Calculation Sheets		Permanent Records	Do Not Destroy*
HR-12-03	HR-12-03 Vacation Days and Banked Time Accruals			10	10 years
HR-13	HR-13 Payroll Administration – Deductions	Includes documentation for staff deductions, including , CSB, union dues, EI, garnishees, teacherage rent, RRSPs, etc. formerly 22720	HR	7	7yrs
HR-14	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. Formerly 23020 Excludes: Employee specific pension information SEE: HR-07	HR	E+10	10yrs after Final payout of the pension or date pension records are transferred to pension authority (e.g. LAPP or ATRF)
HR-15-01	HR-15-01 Payroll Administration - Salary Calendars	Includes records documenting divisional calendars. . Formerly 22702	HR	Permanent Records	Do Not Destroy*
HR-15-02	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. Formerly 22702, 22703, 22704, 22705, 22706	HR	3	3yrs
HR-15-03	HR-15-03 compensation Rates	Compensation Rates documentation for reference only; rate charts are included and kept permanently with collective agreements, as linked. <i>formerly 22704 </i> D-3 		D-3	3 Years
HR-15-04	HR-15-04 Long Service Bonus Rates				
HR-16	HR-16 Monthly Staff changes and Staffing Reports	includes new hire, resignations, retirees and FTE changes (generated by HR)		D-5	5 Years

HR-17	HR-17 Payroll Administration - Student Summer Employment	Includes payroll records regarding the administration of summer student employment, including the Alberta Summer Temporary Employment Program (STEP) and Canada Summer Jobs (CSJ). Includes Employee Timesheets. Excludes: Specific employee records. SEE: HR-04			
	Occupational Health & Safety	CROSSFILED with HS and HR. Accident reports that escalate to WCB claims are to be copied to LE-03 WCB Claims <i> Formerly 23500			
	Worker's Compensation Board (WCB) Documents	CROSSFILED with HS and HR. <i> formerly 23540 Note: some collections are only visible to HR/Payroll staff.			
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-00	HS-00 Safety and Wellness Administration			2 years	Note: Meeting minutes held in Google Shared Drive for staff accessibility
HS-01	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	
HS-02-01	HS-02-01 Health and Safety - Audits and Inspections	Includes records regarding health and safety audits and inspections.	Health & Safety or Originating	3 Years	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.)
HS-02-02	HS-02-02 Health and Safety - Inspection Reports	Includes records of inspections carried out in accordance with the Occupational Health and Safety Act.	Health and Safety	3	Special circumstances might affect the retention of some inspections (e.g., fire code inspections, or machinery inspections, or playground inspections.)
HS-03	HS-03 Health and Safety - 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	3	Incident reports relating to a WCB claim may be retained with WCB in LE-04.
HS-04	HS-04 Health and Safety - 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	transitory	These are not kept in Sharepoint; PRSD Subscribest to an online library maintained by the Canadian Centre of Occupational Health & Safety (CCOHS-CCHST)
HS-05	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. business continuity plans, call lists, supplier/vendor contacts, and related reports.	School/Facilities/Health and Safety	5	
HS-06	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	5	
HS-07	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	E+12	E = Disposal of property
HS-08	HS-08 Mask Exemptions	Records and Correspondance regarding Mask exemptions. Excludes Individual student and employee medical health records (personally identifiable records) See: HR and ST series	Facilities/Health and Safety	short	

IM	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-01	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	E+3 months	E = Expiration of time limited by s. 33.1 for appeal
IM-02-01	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
IM-02-03	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.	Records Management	E+1	E = Dissolution of the corporation
IM-03-01	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	Legal	E + 7	E = Once request is closed
IM-03-02	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.)	Legal	E+1	E = Until obsolete or superseded
IM-03-03	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.	Legal	E + 3	E = Until obsolete or superseded
IM-03-04	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	3 Years	
IM-03-05	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	E+7	E = Closure of Investigation
IM-04	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	E + 3	E = Life of web site
IM-05-01	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	transitory;	Not held in SharePoint
IM-05-02	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	E + 3	E = Life of System

IM-05-03	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	E + 3	E = Life of System
IM-05-04	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	E + 3	E = Life of System
IM-05-05	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	E+9	E = Until obsolete or superseded
IM-05-06	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	short	
IM-05-07	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	
IM-05-08	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	E+2	E = life of system.
IM-06	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	E+1	E = Termination of employee.
IM-07-01	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.		E + 3	E = Life of web site
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.
LE-01-01	LE-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 Formerly 20035	Originating location or corporate office keeps student accidents;all others kept at corporate office	E+5	E = Last action taken that advances claim.
LE-01-02	LE-01-02 Incidents - Discriminaiton and Harassment	Includes records of incidents involving staff and students, incident reports, investigations, and correspondence regarding these issues. Excludes: appeals/hearings SEE: LE-03	Corporate/ Legal	E+5	E=Date of lapse, suspension or cancellation

LE-02	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 Formerly 15100	Corporate/ Legal	E + 1	E = Resolution of issue.
LE-03	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. Formerly 15200	Corporate/Legal	E+5	E = Last action taken that advances claim.
LE-04	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 Formerly 10200	Corporate/ Legal	Permanent	Do Not Destroy*
LE-05-00	LE-05 Agreements and Contracts ARCHIVE	Includes Agreements and Contracts that have a permanent retention.	Corporate/Legal	Permanent	Do Not Destroy*
LE-05-01	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	Corporate/ Legal	Permanent	Do Not Destroy*
LE-05-02	LE-05-02 Contracts and Agreements – Personnel	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 Formerly 10200	Human Resources	Permanent	Do Not Destroy*
LE-05-03	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 Formerly 10200	Corporate/Legal	Permanent	Do Not Destroy*
LE-05-04	LE-05-04 Contracts and Agreements – Governance	Includes ministerial orders and bylaws. Formerly 10200	Corporate/Legal	Permanent	Do Not Destroy*
LE-06	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 Formerly 20030	Corporate/Legal	E +2	E = Expiry Date of Policy
LE-07-01	LE-07-01 Property - Deeds and Titles	Includes original deeds and land titles for any board owned property.	Corporate/Legal	E + 10	E = 10 years after sale or disposal of property Archival Value

LE-07-02	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+10	E = disposal of property.
LE-08	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 Formerly 31670, 31680	Corporate/Legal	E+6	E=expiry date of contract/agreement
LE-09	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	E + 12	E = Claim incident/injury occurred, attributable to defendant that warrants bringing proceeding)
RP	Research and Planning	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.			
RP	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.	Originating Department	E+10	Final reports may be retained longer and/or in applicable department. Likely a lot of crossfiling within AM
RP-01	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	Short	
RP-02	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	E+1	1yr after completion of research project
RP-03	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.	Originating Department	Permanent	Do Not Destroy*
RP-04	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.	Originating Department	E+1	1yrs after completion of research project
RP-05	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	E+1	E = completion of external research project
RP-06	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	short	
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	SI-00 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/Originating Department	E+26 or 7 years after leaving the division	E=Student Date of Birth

SI-01-01	SI-01-01 International Students	Includes 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	Originating Department	long	needs review; what records exist outside of the student record?
SI-01-02	SI-01-02 Student Transfer Administration	Includes all office index cards, 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	E + 3	E=Once Student Leaves the School Store with the Student Record files of students who have moved/transferred
SI-02	SI-02 Scholarships, Bursaries, Awards and Special Student Recognition	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. Agreements for scholarships	Finance/Executive	Permanent	Do Not Destroy*
SI-03	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.	School	medium	needs review;
SI-03	SI-03 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	E + 1	E = Once student leaves the school *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.
SI-04	SI-04 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+10	E = Date student turns 18 *Case files are maintained in accordance with Health Care Professional guidelines.
SI-07	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	3 Years	3 Years
SI-08-01	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	Central Office	E+2 (Low Risk) E+20 (High Risk)	E=Date of activity
SI-08-02	SI-08-02 Student Activity Participation	Includes requests, consent/permission forms, acknowledgement of risk, correspondence and reports regarding school field trips and on and off site activities, consent for 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-12 series	School	E+2 (Low Risk) E+20 (High Risk)	E=Date of activity

SI-09	SI-09 Registers: Student Enrolment and Attendance	Includes registers and reports concerning the enrolment/attendance of students, recording of daily attendance, and daily absence reports. Also includes class registers for non-school system programs such as continuing education, driver education and heritage language programs.	School Principal	E+2	E=Aug 31
SI-10	SI-10 Student Marks	Includes information on students' courses completed, marks received and mark verification sheets, and teacher mark books. Also includes electronic records. Excludes: report cards SEE: SI-06	School - Teaching	E+2	E = Verification in SIRS Note: Student marks are included in the ST-11 series as part of report card. E = on closing school, forward record for student to new school or minister if school unknown
SI-11	SI-12-02 International Students - Hosting and Exchange Program	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	long	
TR	TR Transportation	The function of providing students with transportation.			
TR-00	TR-00 Transportation Administration	Includes records relating to procedures, liaison/correspondence, STAA, ASTAC, and the general administration of the transportation services department	Transportation Services	short	
TR-01	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	short	
TR-02	TR-02 Grants	Includes transportation grant applications and supporting documentation.	Transportation Services/Finance	7	
TR-03	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		Place holder only
TR-04	TR-04 Bus Drivers - Logs	Daily logs.	Transportation Services	6 months	Place holder only
TR-05	TR-05 Vehicle - Records	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	E+1	E=Life of Vehicle; These may be filed by unit number for each vehicle. Primary location for these asset documents falls under FA-14 Series; Primary location for insurance documents falls under LE-07
TR-05-01	TR-05-01 Vehicle - Transportation Insurance	Link to Transportation Insurance in LE			Place holder only
TR-05-02	TR-05-02 Vehicle Accident Reports	Link to Vehicle Accident Reports in LE			Place holder only
TR-05-03	TR-05-03 Vehicle - Inspections	Includes daily and monthly trip inspection reports	Transportation Services	6 months	NOTE – if retention is kept at recommended 6 months, these records will not be scanned for SharePoint storage.
TR-06	TR-06 Routes	Includes route maps, ECS routes, extra service runs, temporary alternate routes, route optimization, bus passenger lists, route maintenance requests.	Transportation Services	Short	needs review;

TR-07	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	Short	needs review;
TR-08	TR-08 Student Incidents Reports	Documentation relating to behaviour/misconduct. Excludes: Accident reports.	Transportation Services	1 year	
TR-09	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. Includes link to HR-03-02 Grievances	Transportation Services		Formal appeal documentation kept in LE-03