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| <b>Administrative Procedures Manual</b> | <b>Administrative Procedure 185</b>   |
|   | <b>Appendix</b>   |
|   | <b>Schedule of Records Retention and Disposal</b>   |
|   | APPROVED: September 1, 2013   |
| Page 1 of 5                             | AMENDED/REVIEWED: September 2019  |
| LEGAL REFERENCE:                        | Section 52, 53, 56, 65, 68, 222 Education Act<br>Freedom of Information and Protection of Privacy Act<br>FOIP Regulation 200/95<br>Student Record Regulation 225/2006<br>Information Bulletin 3.2.5 – Access to Information<br>Information Bulletin 3.2.7 – Student Record Regulation Information |

**Note:** Each file within the records management system is assigned a specific retention period. The retention periods below which reflect a range of years cover all of the records under that primary area.

For example, under General Administration, some files are kept two (2) years, some five (5) years and others seven (7) years depending upon the contents of the said files. The retention period covers the range for the general category.

| <b>Primary Subject Area</b>                                      | <b>Retention Periods</b>   |
|--|--|
| 100 Administration – General                                     | 2-7 Years & Destroy<br>Permanent<br>While Elected or<br>While on Staff |
| 108 Legal Matters, Opinions & Decisions & Disputes               | 7-10 Years and Destroy   |
| 109 Enrolment  | Permanent<br>5 Years & Destroy   |
| 110 School Councils  | 2 Years & Destroy  |
| 112 Schools – General  | 2 Years & Destroy  |
| 115 Schools – Individual   | 5 Years & Destroy  |
| 130 Acts & Legislation – Alberta                                 | Superseded/Obsolete –<br>Destroy                                       |
| 140 Associations, Clubs, Societies & Foundations                 | 3 Years & Destroy  |
| 145 Awards, Honours & Scholarships – General                     | 5-7 Years & Destroy  |
| 155 Corporations, Companies & Firms                              | 2 Years & Destroy  |
| 160 Committees, Councils, Commissions, Consortiums & Task Forces | 3 Years & Destroy  |

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|-----|--|---|
| 165 | Conferences & Working Groups                   | 1-3 Years & Destroy   |
| 172 | Forms  | Superseded/Obsolete & Destroy   |
| 175 | Meetings                                       | 3 Years & Destroy   |
| 180 | News Releases & Publications                   | 1-5 Years & Destroy   |
| 195 | Records Management                             | 2 Years & Destroy<br>Superseded/Obsolete plus<br>2 Years & Destroy<br>Permanent |
| 197 | Freedom of Information & Protection of Privacy | 2-5 Years & Destroy   |
| 200 | Reports, Surveys & Statistics                  | 5-10 Years & Destroy  |
| 210 | Technology – General                           | 3 Years & Destroy   |
| 211 | Software                                       | Superseded/Obsolete & Destroy   |
| 220 | Telecommunications                             | 2 Years & Destroy   |
| 225 | Universities, Colleges & Other Institutions    | 2 Years & Destroy   |
| 230 | Tenders  | 3 Years & Destroy   |
| 240 | Curriculum – General                           | 3 Years & Destroy   |
| 250 | Achievement Tests                              | 5 Years & Destroy   |
| 260 | Diplomas Exams                                 | 5 Years & Destroy   |
| 270 | Curriculum – Guides                            | Superseded/Obsolete & Destroy   |

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|                  |  |  |
|------------------|--|--|
| 300              | Facilities/Land/Properties – General                 | 1 Year & Destroy<br>Permanent  |
| 310              | Capital Projects – General                           | Permanent  |
| 311<br>to<br>324 | Capital Projects – Individual – (Name of<br>Project) | Permanent  |
| 325              | BQRP Projects  | Permanent  |
| 330              | Maintenance – Individual Facilities                  | 5 Years & Destroy<br>Permanent                                       |
| 350              | Finance – General                                    | 7-8 Years & Destroy<br>Superseded/Obsolete &<br>Destroy<br>Permanent |
| 360              | Audits   | 2 Years & Destroy  |
| 375              | Budget – General                                     | 7 Years & Destroy  |
| 380              | Budget Preparation/Submission                        | 7 Years & Destroy  |
| 410              | Cash & Banking                                       | 6 Years & Destroy  |
| 425              | Contracts, Agreements & Leases                       | Superseded/Obsolete plus<br>7 Years & Destroy                        |
| 480              | Funds & Grants – General                             | 6 Years & Destroy  |
| 485              | Funds & Grants – Funding for School<br>Authorities   | 6 Years & Destroy  |
| 487              | Funds & Grants – Special Education                   | 6 Years & Destroy  |
| 489              | Funds & Grants – Technology                          | 6 Years & Destroy  |
| 520              | Insurance  | Permanent  |

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| 550 | Human Resources – General                      | 5 Years & Destroy                            |
| 555 | Evaluations                                    | Permanent                                    |
| 560 | Recruitment & Selection – General              | 2-5 Years & Destroy<br>Permanent             |
| 570 | Health & Safety                                | 10 Years & Destroy                           |
| 580 | Labour Relations – General                     | 5 Years & Destroy<br>Permanent               |
| 590 | Pay, Benefits & Deductions                     | 7 Years & Destroy                            |
| 630 | Professional Development – General             | 3 Years & Destroy                            |
| 640 | Retirement/Severance                           | 5 Years & Destroy                            |
| 700 | Plans, Programs & Projects – General           | 10 Years & Destroy                           |
| 710 | Three-Year Education Plan – General            | 3-10 Years & Destroy                         |
| 712 | Three-Year Education Plan – Individual Schools | 10 Years & Destroy                           |
| 715 | Commissioner of Services for Children          | 10 Years & Destroy                           |
| 750 | Special Education                              | 10 Years & Destroy                           |
| 755 | Guidance & Counselling – General               | 10 Years & Destroy                           |
| 760 | Transportation – General                       | 5 Years & Destroy                            |
|     | Student Records                                | In accordance with Student Record Regulation |
|     | Minute Books                                   | Permanent                                    |

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| Jurisdictional Boundaries                     | Permanent                                 |
| Land Deeds                                    | Permanent                                 |
| General Ledger                                | Permanent                                 |
| Bank Statements and Cancelled Cheques         | 7 Years & Destroy                         |
| Receipts and Receipt Books                    | 7 Years & Destroy                         |
| Deposit Books and/or slips                    | 7 Years & Destroy                         |
| Journal Entry Vouchers                        | 7 Years & Destroy                         |
| Paid Invoices and Vouchers (Accounts Payable) | 7 Years & Destroy                         |
| Customer Invoices (Accounts Receivable)       | 7 Years & Destroy                         |
| Payroll                                       | 7 Years & Destroy                         |
| Personnel                                     | 10 Years from End of Employment & Destroy |
| Applications (Individuals not hired)          | 1 Year & Destroy                          |