

SCHOOL DISTRICT NO. 51 (BOUNDARY)

P O L I C Y

SECTION	TITLE	NO. 2000
FINANCE/FACILITIES	<u>Retention & Disposal of School District Documents</u>	

DATE ADOPTED: March 14, 2000

DATE REVIEWED: March 13, 2018

The Board acknowledges that records held by School District No.51 (Boundary) will be retained while they are used in the operation of the District and that records will be destroyed at the completion of their useful life. Both retention and disposal of records will be done in compliance with pertinent Federal and Provincial legislation and as specified in the following regulation.

R E G U L A T I O N S

General Considerations

1. The Secretary Treasurer, the supervisor of the department, or the Administrative Officer of a school responsible for the record is authorized to destroy the records in accordance with the following schedules.
2. Federal and Provincial Acts, e.g. E.I., W.C.B., Revenue Canada, Customs, Excise, and F.O.I.P.O.P., etc., require that certain documents be retained for audit and other purposes. It should be understood, therefore, that where an Act specifies a period longer than that given in this Regulation, the Act takes precedence. If there is any doubt as to what procedure is necessary, the appropriate authority should be contacted.
3. It is understood documents in the "indefinite" and other classifications may be microfilmed, or electronically and digitally stored, provided written permission is received from the governing authority.
4. Documents not listed in this appendix and not required to be retained for periods specified by law should be considered for retention/disposal taking into account their future value for legal, historical or statistical purposes and availability of similar data elsewhere.

Minimum Period of Retention

The following retention schedule outlines the minimum amount of time that School District No. 51 (Boundary) records must be retained:

A. Board Records

Board Policy	Indefinite
Board Minutes (Regular & Special)	Indefinite
Wages and Salary Agreements	Indefinite
Board Committee Reports	Indefinite
List of Electors	Three Years
General Election Notices	Three Years
Oaths and Declarations	Term of Office
Annual Report	Indefinite
District Publications	One Year

B. Financial

Budgets (Ministry Submission)	Indefinite
Budget (Supporting Documents)	Six Years
Financial Statements & Audit Reports	Indefinite
Financial Statements (Supporting Documents)	Six Years
Debenture By-Laws and Register	Indefinite
Books of Original Entry (GL Summary)	Indefinite
Journal Entries, Monthly Reports & Subsidiary Ledgers	Three Years
Payroll Journals & Reports	Six Years +
Accounts Payable and Receivable	Six Years
Canceled Cheques	Six Years
Purchase Orders (Board Office Copy)	Three Years
Purchase Orders (School Copy)	One Year
Cash Receipts	Six Years
Bank Statements and Related Documents	Six Years
Debentures and Related Documents	Six Years
Payroll Remittances	Six Years
Time Sheets	Six Years

C. Buildings & Property

Appraisal and Inventory Records	Six Years
Capital Expenditure Authorization	Indefinite
Rental Forms	One Year
Plans, Specifications and Related Documents	Indefinite
Titles and Deeds	Indefinite
Borrowing Authority e.g. Orders-In-Council	Indefinite
Leases	Indefinite

D. General Administration

Insurance Claims	Indefinite
Violence Incident Reports	Six Years
Miscellaneous Reports e.g. WCB, Health, Fire Marshall, Boiler/Electrical, Elevator Inspections	Indefinite
General Correspondence	Three Years
Accident Reports	One Year
Annual Statistical Forms	One Year
Ministry of Education Circulars	Useful Life
Insurance Policies	Indefinite

E. Human Resource Records

Personnel Files	Until Employee is 75 years or deceased
Seniority Lists	Indefinite
Employment or Other Contracts	Six Years

F. Student Records

Pupil Records	Indefinite
Attendance and School Registers	Indefinite
Permanent Record Cards	Indefinite
Teachers' Students Files	Useful Life
Other Student Records	Useful Life

G. Transportation Data

Bus Registration Forms	One Year
Transportation Assistance Forms	One Year
Bus Behavior Reports	One Year
Bus Video Tapes	One Week or Useful Life