

Legend: P – Permanent; Superseded or Obsolete – Replaced with; Event - Specified period after a particular event occurs ** - Subject to Archival Selection; D – Dispose				Subject to Archival Selection - Identifies records that may preserve history and may be of value for inclusion in archives. Where school boards do not have an official archive, consideration should be given to maintaining the records permanently.				
Administration Management								
CLASSIFICATION CODE	ACTIVITY	DESCRIPTION	SUGGESTED RETENTION TRIGGER	TOTAL RETENTION	SUGGESTED METADATA	GRRS REFERENCE	NOTES	
ADM-01	Associations and Organizations	Includes correspondence, minutes, agenda, notices and reports regarding organizations and associations to which staff members belong or with which they communicate in the course of their duties.	Calendar Year End Date	1 Year	Association/ Organization Name	Administration/Meetings Management/External Meetings: Associations/Organizations/Government		
ADM-02	Staff and Internal Committee Meetings	Includes records regarding the activities of staff and internal committees meetings. Includes notices of meetings, agenda, minutes, etc. May also include copies of staff activity reports.	Calendar Year End Date	4 Years **	Department, Division or Committee Name	Administration/Meetings Management/Internal Meetings: Administrative and Staff		
ADM-03	Office Services	Includes records regarding rates and services provided by courier, mail and postage firms. Also includes records regarding the inter-office mail system, internal printing, and management of forms and templates. May also include translation services.	File Closed Date	1 Year	Year	Administration/Office Services/Board Services Internal		
ADM-04	Travel and Accommodation	Includes records regarding travel and accommodation arrangements. Includes itineraries, maps, authorizations, reservations, rented vehicles and catalogues and brochures concerning hotels, convention sites and restaurants.	Calendar Year End Date	1 Year	Year	NEW		
ADM-05	Intergovernmental Relations	Includes correspondence and other records of a general nature regarding the relationship with all other levels of government (such as telephone numbers, contact names, etc.). May include correspondence to and from Boards. Where possible, these records should be filed by their subject, not the originator or recipient of the report and/or correspondence.	Calendar Year End Date	5 Years**	Year, Document Type	NEW		
Communication Management								
CLASSIFICATION CODE	SECONDARY HEADING	DESCRIPTION	SUGGESTED RETENTION TRIGGER	TOTAL RETENTION (# OF YEARS AFTER CURRENT YEAR)	SUGGESTED METADATA	GRRS REFERENCE	EXCLUSION	EXCLUSION CONT'D
COM-01	Advertising	Includes records regarding public advertising in magazines, newspapers, radio, television, and transit.	Calendar Year End Date	1 Year**	Advertising Type	NEW		
COM-02	Ceremonies and Events	Includes records regarding events sponsored by the board or by schools (e.g. parents' night, school opening ceremonies, reunions, etc.). Includes memos, notices, correspondence with parents and all related materials.	Event Date	5 Years**	Ceremony or Event Name, Document Type	Communications & Public Relations/Event Management/Events		
COM-03	Charitable Campaigns/Fundraising	Includes records regarding the campaign for the raising of funds and donations such as the United Way or other community interest groups, etc. Excludes the management of the funds.	File Closed Date	1 Year	Charitable Organization	NEW		
COM-04	Commendations, Awards & Recognition	Includes commendations received from the general public and parents regarding various programs and the treatment of students, certificates of appreciation, and awards a recognition of staff.	File Closed Date	5 Years**	Received Date	Communications & Public Relations/Media & Public Relations/Commendations, Awards & Recognition		
COM-05	Complaints	Includes records related to general complaints about the board/school and its activities. Includes correspondence, investigations, findings, and related reports regarding resolution. Complaints about a specific project or program may be contained within the program. Excludes complaints specific to an individual student or staff member.	File Closed Date	5 Years **	Received Date	Communications & Public Relations/Media & Public Relations/Complaints		
COM-06	News Reports	Includes clippings from newspapers, information from journals and other printed media. May also include information related to online media coverage, radio or television clips.	Calendar Year End Date	1 Year**	Year	Communications & Public Relations/Media & Public Relations/News Reports		
COM-07	Media Relations & News Releases	Includes background notes and final versions of news, press and information releases issued. Includes messages for inclusion in special event programs.	Calendar Year End Date	3 Year**	Year, Topic	Communications & Public Relations/Media & Public Relations/Media Relations & News Releases		
COM-08	Publications	Includes typed manuscripts, artwork, printed copies and related records regarding the publication of information about schools, etc. May include annual reports of a non-financial nature as well as copies of social networking sites (website, Facebook, etc.).	Published Date	3 years** if publication is subject to copyright or trademark	Published Date, Publication Type	Communications & Public Relations/Media & Public Relations/Publications		
COM-09	Speeches and Presentations	Includes background notes and final versions of speeches and presentations prepared for delivery by Board/school staff and elected officials.	Calendar Year End Date	3 Years**	Audience	Communications & Public Relations/Media & Public Relations/Speeches and Presentations		
COM-10	Visual Isignia and Branding	Includes board and school records regarding branding and the standards which apply to graphic designs as part of a Visual Identity Program. Includes trademarks, logo and letterhead design, signage, flags, vision statement, colours, mascot, etc.	Superseded or Obsolete	5 Years**	Document Type	NEW		
COM-11	Website and Social Media Content	Includes records of website content and copies of web pages created for general public use. Also includes information on social media sites such as Facebook & Twitter.	Superseded or Obsolete	2 Years**	Social Media Type (Facebook, Instragra, Twitter), Date Posted, Year	NEW		
COM-12	Public Relations	Includes recorded information regarding the Board's relations with the public as well as recorded information relating to the production and distribution of information to the public, outside agencies, and schools.	Calendar Year End Date	5 years**	Topic	Communications & Public Relations/Media & Public Relations/Public Relations		

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COM-13	Memorabilia	Includes records regarding school program department and/or Board memorabilia, collectibles and other historical items which reflect the individual nature of the schools, programs and departments such as informal school histories, school logos and crests, songs, names colours, equipment, reference materials, etc. Includes class photos, yearbook photos and official/Trustee group photos	Calendar Year End Date	5 Years**	Memorabilia Type	Communications & Public Relations/School Personal Collections/ Memorabilia	
Facilities Management							
CLASSIFICATION CODE	ACTIVITY	DESCRIPTION	SUGGESTED RETENTION TRIGGER	TOTAL RETENTION (# OF YEARS AFTER CURRENT YEAR)	SUGGESTED METADATA	GRRS REFERENCE	EXCLUSION CONT'D
FAM-01	Property Deeds and Titles	Includes records related to original deeds of any board owned property.	File Closed Date	10 Years - Property disposed	Property Title	Governance and Legal/ Agreements/ Real Property Management/ Deeds & Titles	
FAM-02	Property Acquisition and Sales	Records include correspondence, reports and backup documentation relating to the acquisition or sale of lands. Includes land purchase agreements, development agreements, property appraisals, valuations and quotes concerning land owned by the board or under consideration for purchase.	File Closed Date	10 Years - Property disposed	Date of Sale	Governance and Legal/ Agreements/ Real Property Management/ Property Acquisition & Sales	
FAM-03	Building and Property Maintenance	Includes records related to support the maintenance and operations of buildings.	File Closed Date	5 Years File Closed Date = as long as building remains Board property	Building Name	Facilities Management/Assets & Property Management & Maintenance/Maintenance and Operations: Physical Plant and Equipment	
FAM-04	Grounds and Parking Maintenance and Operations	Includes records related to maintenance and operations of school grounds and parking such as: requisitions, work orders, logs and reports showing actions taken re grounds keeping, snow clearance, and cleaning.	File Closed Date	3 Years - completion of inspection of completion of maintenance		Facilities Management/Assets & Property Management & Maintenance/Maintenance and Operations: Grounds	
FAM-05	Construction and Renovation Projects	Includes records for the planning of construction and renovations of buildings such as: budgets, estimates, project plans and schedules, progress reports, project meeting minutes, certificates of clearance, project drawings and correspondence regarding the building of schools and other properties.	File Closed Date	Project finished and no outstanding issues + 6 Years**	Project Document Type (meeting notes, report, design document, inspection document), Responsible Department	Facilities Management/Assets & Property Management & Maintenance/Facilities Construction Projects	
FAM-06	Building Structure Systems	Includes records regarding building systems that are part of the building structure such as HVAC, ventilation, fire and life systems, electrical safety, elevators, furnace, and emergency lighting. Includes manufacturer's operation/technical manuals and warranties; inspection and testing reports; approved life safety studies, approved compliance equivalencies, inspection log books and remedial action for building systems.	Superseded Date or life of system/ asset	Dispose	Building Name	NEW	
FAM-07	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.	File Closed Date	15 Years File Closed Date = as long as building remains Board property	Building Name	Facilities Management/Assets & Property Management & Maintenance/Drawings and Specifications	
FAM-08	Office Equipment and Furniture	Includes records regarding the maintenance of owned and leased office equipment and furniture. Includes chairs, desks, tables, photocopiers, printers, scanners, etc.	Disposal Date	2 Years	Equipment Name	Facilities Management/Assets & Property Management & Maintenance/Maintenance and Operations: Physical Plant and Equipment	
FAM-09	Environmental Assessments and Studies	Includes information relating to soil, tree preservation and mitigation, geotechnical infrastructure expansion, water, air, and other environmental issues.	File Closed Date	Dissolution of Board + 5 Years		Facilities Management/ Assets & Property Management & Maintenance/ Environment Assessments & Studies	
FAM-10	Facilities Planning	Includes records regarding the allocation of classroom and workspace to staff and students. Records include correspondence, proposed enrolment studies and reports, facilities use plans, facilities designs and layouts, furniture layouts, etc.	Calendar Year End Date	7 Years		Facilities Management/ Assets & Property Management & Maintenance/ Facilities Planning	
FAM-11	Land Surveys	Records include land survey information such as legal property surveys, construction layout and control surveys, and field notes.	File Closed Date (Board no longer owns property)	5 Years**		Facilities Management/ Assets & Property Management & Maintenance/ Land Surveys	
FAM-12	Permits/Facility Bookings	Records includes copies of permits issued by the board for the use of school property for purposes such as polling stations and community events. Also includes applications for permits, lists of permit holders and inter-jurisdictional permits.	Permit Expiry Date	2 Years	Permit Number	Facilities Management/ Assets & Property Management & Maintenance/ Permits/Facility Bookings	
FAM-13	Building and Site Approvals	Includes documentation such as site plan approvals, building permits, Life Safety Plan and municipal reports pertaining to the approval of building plans, Fire Marshal's Office, Ministry of Education, Ministry of Health and other government bodies.	File Closed Date	15 Years File Closed Date = as long as building remains Board property	Building Name	Facilities Management/Assets & Property Management & Maintenance/Building and Site Approvals	

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Administration Management

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FAM-14	Inspection 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 water flushing logs, water testing reports, elevator logs, sanding and salting logs, playground equipment inspections logs, chemical treatment logs, underground storage tank inspections, playground inspections, physical education equipment inspections, technical program equipment, etc.	Calendar Year End Date	6 Years		Facilities Management/ Inspection and Testing/ Health and Safety Inspection Reports	

Financial Management

CLASSIFICATION CODE	ACTIVITY	DESCRIPTION	SUGGESTED RETENTION TRIGGER	TOTAL RETENTION (# OF YEARS AFTER CURRENT YEAR)	SUGGESTED METADATA	GRRS REFERENCE	EXCLUSION
FIN-01	Accounts Payable	Includes records documenting funds payable by the Board, such as paid invoices, receipts, copies of cheques issued to pay account, reports, telephone bills and membership fees.	Fiscal Year End Date	7 Years	Payment Date, Fiscal Year, Vendor	Financial Management/ Accounting Administration/ Accounts Payable	
FIN-02	Accounts Receivable	Records relating to the accounting for money owed to schools and boards. Records include invoices, cash receipts, correspondence, cash lists and statements of account.	Fiscal Year End Date	7 Years	Received Date, Fiscal Year	Financial Management/ Accounting Administration/ Accounts Receivable	
FIN-03	Financial Audits	Includes records regarding internal and external financial audits.	File Closed Date	7 Years	Fiscal Year	Financial Management/ Financial Reporting/ Audits - Financial	
FIN-04	Banking	Includes records regarding banking transactions and relationships with banks, bank statements, bank reconciliations, deposit records, cancelled cheques, returned cheques, and cheque stubs.	Fiscal Year End Date	7 Years	Fiscal Year, Financial Institution	Financial Management/ Accounting Administration/ Banking	
FIN-05	Budgets and Estimates	Includes departmental and board budgets and plans, both capital and operating. Includes all working notes, calculations and background documentation. Also includes Budget Variances.	Fiscal Year End Date	7 Years **	Fiscal Year, Quarter	Financial Management/ Financial Planning/ Budgets	
FIN-06	Assets	Includes records regarding current and fixed assets. Includes fixed asset inventory including records of initial expenditure, depreciation, amortization, and disposal.	File Closed Date (Asset Disposal Date)	10 Years **	Asset		
FIN-07	Financial Statements	Includes the Balance Sheet, Income Statement and Statement of Source and Application of Funds. Also includes audited financial statements.	Fiscal Year End Date	P	Fiscal Year	Financial Management/ Financial Reporting/ Financial Statement	
FIN-08	Grants, Loans and Subsidies	Includes records related to grants and subsidies for Federal, Provincial and Municipal bodies. i.e. SEA claims & reporting, SIP claims, Section 23 CCTC Reporting	File Closed Date (Loand Repayment Date)	7 Years	Fiscal Year, Grant Received	Financial Management/ Accounting Administration/ Grants & Subsidies	
FIN-09	Investments and Debentures	Includes records regarding the Board's investments, term deposits and promissory notes, records regarding the debentures issued, information on the initial issuance of the debenture and records of payments made to investors.	File Closed Date (Account Closure Date)	7 Years	Investment Type, Financial Institution	Financial Management/ Financial Reporting/ Investments & Debentures	
FIN-10	Subsidiary Ledgers and Registers	Includes all subsidiary ledgers and registers, completed journal voucher forms, input forms, and all background documentation used to substantiate journal entries. Also includes payroll registers, and debenture registers.	Fiscal Year End Date	7 Years **	Fiscal Year	Financial Management/ Financial Reporting/ Ledgers: Subsidiary Ledgers, Registers and Journals	
FIN-11	General Ledgers and Journals	Includes all records in the Books of Original Entry.	Fiscal Year End Date	P	Fiscal Year	Financial Management/ Financial Reporting/ Ledgers: General	
FIN-12	Payroll	Includes all records of payments of salary, wages and deductions to employees including vacation entitlement and pay, alternative vacation entitlements, notice of garnishment and termination or severance pay. Includes time sheets and vacation taken, pay lists, T4 Slips, Record of Earnings for pension contribution purposes, Records of Employment (ROE) and Statistics Canada reports.	Fiscal Year End Date	7 Years	Fiscal Year, Pay Period, Employee Name	Financial Management/ Financial Reporting/ Payroll	
FIN-13	Purchase Orders and Requisitions	Includes purchase orders and requisitions, blanket orders, and all background documentation authorizing the procurement of goods and services.	Fiscal Year End Date	7 Years	Fiscal Year, Vendor Name	Financial Management/ Procurement/ Purchase Orders & Purchase Requisition	
FIN-14	Quotations and Tenders	Includes records regarding quotations and tenders obtained from suppliers of goods and services. Includes Requests for Proposal, Invitations to Tender, Proposals, Tender Submissions, Pre-qualifications, and all documentation regarding the selection process.	File Closed Date (Unsuccessful bids - retain for 1 year from contract award)	7 Years **	Fiscal Year, Vendor Name	Financial Management/ Procurement/ Tenders & Quotations	
FIN-15	Scholarship Funds, Bequests and Donations	Records regarding the administering & setting up of scholarship funds & donations, including fund histories, correspondence & data sheets. Background information, copies of wills regarding the administration of the bequests & donations of monies & other materials to the Board.	File Closed Date	5 Years - Life of Board	Fiscal Year	Financial Management/ Accounting Administration/ Scholarship Funds, Bequests & Donations	
FIN-16	School Generated Funds	Includes records on funds allocated to or raised by the school/parent council, student council or other student, parent or community groups consisting of account receivable and payable documents such as invoices and vouchers.	Fiscal Year End Date	7 Years	Fiscal Year	Financial Management/ Accounting Administration/ Non-Board Funds	
FIN-17	Working Papers – Financial	Includes all working notes, calculations, reconciliations, end of year payment in lieu of taxes statements to school, and background documentation used to calculate financial statements such as the Monthly Trial Balance.	File Closed Date (Completion of Audit)	1 Year	Fiscal Year	Financial Management/ Financial Reporting/ Financial Working Papers	

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FIN-18	Enrolment & Financial Reporting	Includes all counts, summaries and projecting documenting enrolments in the school system and statistical reports required by the Ministry of Education as part of the funding process for the preparation of educational statistics, e.g. OnSis October and March school/board reports. Also school audits on enrolment and documentation determining a student's status.	Fiscal Year End Date	7 Years	Fiscal Year	Financial Management/ Financial Reporting/ Enrolment & Financial Reporting	
FIN-19	Funding Assessments	Includes records relating to the direction of school support, levies and related assessments. Also includes information on fee-paying, non-resident and international visa students.	Fiscal Year End Date	7 Years	Fiscal Year	Financial Management/ Financial Reporting/ Funding Assessments	
FIN-20	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.	File Closed Date (Project completion)	10 Years **	Fiscal Year	Financial Management/ Financial Planning/ Capital Projects Planning	
FIN-21	Taxation	Includes records documenting taxation such as gas surtax reports, income tax returns and sales tax tables. Also included Harmonized Sales Tax (HST), accounting and information on exemptions and refunds.	Fiscal Year End Date	7 Years	Fiscal Year	Financial Management/ Financial Planning/ Taxation	
FIN-22	Vendors and Suppliers	Includes records regarding vendors and suppliers of goods and services as well as information about these goods and services, such as catalogues, price lists, correspondence, and bidders' information sheets.	File Closed Date	2 Years	Vendor Name	NEW	
Governance							
CLASSIFICATION CODE	ACTIVITY	DESCRIPTION	SUGGESTED RETENTION TRIGGER	TOTAL RETENTION (# OF YEARS AFTER CURRENT YEAR)	SUGGESTED METADATA	GRRS REFERENCE	EXCLUSION
GOV-01	Articles of Incorporation, By-Laws and Constitution	Includes records related to the operation of the School Board as a legal entity.	File Closed Date	5 Years - Life of Board	Document Type	Governance and Legal/ Board & Council Administration/ Articles of Incorporation, By-Laws and Constitution	
GOV-02	Policies, Procedures, Guidelines and Directives	Includes directive, policy and procedure manuals, work instructions, protocols, guidelines and directives relating to administrative, governance and operational processes.	Superseded Date	5 Years - Life of Board	Approval Date, Responsible Department	Governance and Legal/ Policies, Procedures, Directives/ Internal Guidelines, Policies, Procedures, Memoranda and Directives	
GOV-03	Administrative Council(s) Agenda and Minutes	Includes notices of meetings and agenda and minutes of Council meetings as well as working notes used in agenda preparation.	Meeting Date	5 Years - Life of Board	Meeting Document Type: Agenda, Minutes, Presentation	Governance and Legal/ Board & Council Administration/ Administrative Council(s)	
GOV-04	Board Agenda and Minutes	Records relating to Board minutes, agendas and reports, including all back-up material.	Meeting Date	5 Years - Life of Board	Meeting Document Type: Agenda, Minutes, Presentation	Governance and Legal/ Board & Council Administration/ Board Agendas, Minutes and Reports	
GOV-05	Standing and Ad Hoc Committees	Includes agendas, reports, and minutes of all Board committees established by statute (Special Education Advisory Committee, Parent Involvement Committee, Audit Committee, Supervised Alternative Learning Committee), or established by the Board of Trustees to consider, on an ongoing or limited basis, a specific fixed area of the Board's operation.	Meeting Date	5 Years - Life of Board	Meeting Document Type: Agenda, Minutes, Presentation	Governance and Legal/ Board & Council Administration/ Standing & Ad Hoc Committees	
GOV-06	Trustee Records	Includes records and relevant materials relating to position on Board.	File Closed Date	4 Years - end of term		Governance and Legal/ Board & Council Administration/ Trustee Records	
GOV-07	Trustees' Register	Includes a register of the names, addresses and occupations of trustees, including the dates on which each became or ceased to be a trustee.	File Closed Date	5 Years - Life of Board		Governance and Legal/ Board & Council Administration/ Trustees Register	
GOV-08	Code of Conduct	Includes records relating to Code of Conduct trustee complaints and related investigations, Integrity Officer appointments and reports (including Integrity Commissioner reports, Ombudsman investigations and reports), closed meeting investigations and initiatives, registry of lobbyists, etc.	File Closed Date	2 Years		NEW	
GOV-09	Strategic Planning	Includes all strategic and operational documents, mandates, as well as related correspondence, background and reference information. Management plans, School Improvement Planning, Business Budget Planning, and Integrated System Plan.	File Closed Date	10 Years **	Fiscal Year, Planning Document Type: School Improvement Plan, Business Budget Plan, Integrated System Plan	Planning and Research/ Research Design & Planning/ Strategic Planning	
Health and Safety Management							
CLASSIFICATION CODE	ACTIVITY	DESCRIPTION	SUGGESTED RETENTION TRIGGER	TOTAL RETENTION (# OF YEARS AFTER CURRENT YEAR)	SUGGESTED METADATA	GRRS REFERENCE	EXCLUSION
HSM-01	Accessibility of Services and Information	Includes records relating to the accessibility of buildings, services and information to persons with disabilities. Also includes records that identify, remove and prevent barriers for persons who work, learn or volunteer in and/or use services in Board facilities.	Calendar Year End Date	6 Years	Building, Responsible Department	Facilities Management/ Health, Safety & Security/ Accessibility of Services and Information	
HSM-02	Confined Spaces	Includes records relating to the assessment of confined spaces and the written plan and procedures for the control of hazards in confined spaces.	File Closed Date	3 Years	Building, Responsible Department	Facilities Management/ Health, Safety & Security/ Confined Spaces	

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HSM-03	Emergency Planning	Includes records regarding emergencies and related plans to support the board/school in case of fire or other emergencies. Records include emergency plans and procedures including for lock-downs and business continuity plans.	File Closed Date	5 Years		Facilities Management/ Training & Skills Development/ Emergency Plans and Procedures	
HSM-04	Hazardous, Biological, Chemical or Physical Agents	Includes records regarding the monitoring of hazardous chemical & physical agents, and designated substances in accordance with the Occupational Health & Safety Act. Also includes air quality reports, and excludes exposure records.	File Closed Date	7 Years		Facilities Management/ Training & Skills Development/ Hazardous, Biological, Chemical or Physical Agents	
HSM-05	Designated Substances & Hazardous Materials – Waste Monitoring and Management	Includes records related to the management and disposal of chemical, biological or physical agents or substances.	File Closed Date	5 Years		Facilities Management/ Training & Skills Development/ Designated Substances & Hazardous Materials – Waste Monitoring and Management	
HSM-06	Employee Health and Safety Incident Reports	Includes general records relating to incidents that affect health and safety of staff. For example emergency response, school illness, infections, quarantines, etc. Records include reports, correspondence and summaries, information related to actions taken by staff.	File Closed Date	No further appeal + 3 years for adults	Incident location: Board Office, School	Facilities Management/ Training & Skills Development/ Health and Safety Incident Reports	
HSM-07	Occupational Health and Safety Committee	Includes information regarding the occupational health and safety of staff and students. Joint Health & Safety Committee minutes, inspections, WHMIS, quarantines, infestations, playground safety, Safety Data Sheets (formerly known as Material Safety Data Sheets), health and safety inspection reports, etc.	Calendar Year End Date	3 Years	Document type: Inspection, Report, Committee Minutes	Facilities Management/ Training & Skills Development/ Occupational Health & Safety	
HSM-08	Building Security Administration	Includes records regarding the security of office and school facilities and properties such as control of keys, trespassing, emergency telephone numbers/contacts, and police station locations. Also includes school visitor book and contractor logs, etc. Excludes video surveillance system records.	Calendar Year End Date	2 Years		Facilities Management/ Training & Skills Development/ Site Security Administration	
HSM-09	Video Surveillance	Includes reports and footage captured through the use of video surveillance in schools and buses.	Calendar Year End Date	1 Year		Facilities Management/ Training & Skills Development/ Video Surveillance Reports	
HSM-10	Fire Protection Systems and Emergency Power Systems	Includes records regarding the inspection and testing of emergency power systems, fire extinguishers and fire protection systems.	File Closed Date	2 Years	Inspection Date, Inspector	Facilities Management/ Inspection and Testing/ Fire Protection Systems and Emergency Power Systems	
Human Resources Management							
CLASSIFICATION CODE	ACTIVITY	DESCRIPTION	SUGGESTED RETENTION TRIGGER	TOTAL RETENTION (# OF YEARS AFTER CURRENT YEAR)	SUGGESTED METADATA	GRRS REFERENCE	EXCLUSION
HRM-01	Attendance	Includes records regarding the planning of employee attendance. This includes dates and times of hours worked and as well as of on-call schedules and any changes made to on-call scheduling including cancellations Includes statements related to public holiday substitution dates.	File Closed Date	3 Years	Employee Name, Responsible Department	Human Resources Management/ Staff Management/ Attendance-Employee	
HRM-02	Benefits Program	Includes records regarding benefits offered to employees such as group insurance, dental plans, wellness & Employee Assistance Program (EAP). Includes brochures, rates, quotes, correspondence, explanatory documents, benefit rate changes & premium adjustments.	File Closed Date	1 Year **	Benefit Program Type (group insurance, dental plan, wellness, employee assistance program)	Human Resources Management/ Compensation & Benefit Administration/ Benefit Plans	
HRM-03	Employee Records	Includes records regarding the employment history of employees such as: resumes, performance appraisals, employee recognition, leave documentation, training reports and correspondence. May also include records related to agreements on hours of work. Includes employees that are full-time, part-time, student employees and volunteers. Includes records regarding individual employee certification, credentialing and mandatory training required by legislation or professional standards as a condition of employment.	File Closed Date (Employee Departure Date)	date employee ceased to be employed by employer + 10 Years	Employee Name, Department	Human Resources Management/ Staff Management/ Employee Records	
HRM-04	Human Resource Planning	Includes records of succession planning, executive placement, retirement program such as early retiremen incentive, staff turnover rates, staff mobility, staffing level plans, annual hire/promotion targets, recruitment freezes, pay equity plans, employment equity, performance management, volunteer plans, employee information reporting and related records.	Superseded Date	5 Years **	Year, Approval Date	Human Resources Management/ Compensation & Benefit Administration/ Pay Equity	Human Resources Management/ Organizational Planning/ Human Resources Planning
HRM-05	Job Descriptions	Records include job descriptions and specifications as well as background information.	Superseded Date	D **	Approval Date	NEW	
HRM-06	Labour Relations and Negotiations (Union and Non-Union)	Includes records related to collective bargaining, e.g. final offers, memoranda of settlement, mediations, arbitrations and data used in preparation for bargaining.	File Closed Date (Contract End Date)	P		Human Resources Management/ Labour/Employee Relations/ Labour Relations & Negotiations, Union/Non-Union	

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Administration Management

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HRM-07	Organizational Design	Includes records regarding reporting relationships, reorganization, organizational analysis. Records include org charts.	Superseded Date	1 Year **	Department	Human Resources Management/ Organizational Planning/ Organization Structure	
HRM-08	Compensation Planning	Includes records regarding the planning and scheduling of salaries, such as job evaluations, job classification systems, compensation ranges, salary surveys and schedules. Also includes any reference material retained regarding issues related to pay equity and compliance.	Superseded Date	10 Years	Year, Approval Date	Human Resources Management/ Compensation & Benefit Administration/ Compensation Planning	
HRM-09	Pension Planning	Includes information and records relating to pension information such as: Annual Information Returns; General Information on OMERS and other Annuities; Ontario Teachers' Pension Plan; Teacher's Pension Plan Certification; Pension reconciliation balances.	File Closed Date	P		Human Resources Management/ Compensation & Benefit Administration/ Pension	
HRM-10	Recruitment	Includes records regarding the recruitment of staff. Includes job postings, copies of advertisements, records regarding competitions and unsuccessful applications.	File Closed Date	3 Years	Department, Date Posted	Human Resources Management/ Recruiting & Selecting/ Recruitment	
HRM-11	Training and Development	Includes records regarding courses and conferences facilitated by the board for staff development and information on career and professional development programs. Also includes conference proceedings and presentations, orientation materials and staff development calendars.	File Closed Date	3 Years**	Department	Human Resources Management/ Labour/ Training & Skills Development/ Professional Development Programs and Materials	
HRM-12	Grievances	Includes records regarding grievances filed by employees such as evaluation reports, notifications, correspondence with union concerning grievance initiators & legal opinions. Includes arbitrations.	File Closed Date (Resolution Date)	15 Years	Received Date	Human Resources Management/ Labour/Employee Relations/ Grievances	
HRM-13	Harassment and Violence Complaints, Allegations and Investigations	Includes records dealing with harassment and/or violence complaints by or against employees. It includes documents such as the initial complaint, investigation, reports and final resolution.	File Closed Date (Resolution Date)	P	Received Date	Human Resources Management/ Labour/Employee Relations/ Harassment Complaints, Allegations and Investigations	
HRM-14	Criminal and Vulnerable Sector Background Checks	Includes records listing any criminal code convictions that have not been pardoned for all existing and new employees, service providers and volunteers that come into direct contact with students on a regular basis. Includes Annual Offence Declarations.	File Closed Date (Employee Departure Date)	10 Years	Employee Name, Department	Human Resources Management/ Staff Management / Criminal Background Checks	
HRM-15	Employee Medical Records	Includes records related to employee's medical health such as: doctor's notes, correspondence, and health reports related to an employee's medical situation. Includes all records related to Long term disability, short- and long-term illnesses, WSIB, attendance management, workplace accommodations. Includes medical records, doctor's notes, correspondence, and health reports related to an employee's medical situation. Includes information and records relating to employee's illness or injuries that will assist the employee's return to the workplace (WSIB).	File Closed Date (Resolution Date)	Event + 40 years Event = Date first record created in personal exposure record And: Event + 20 years Event = Date last record added to personal exposure record	Employee Name, Department	Human Resources Management/ Health & Wellness/ Disability Management	
HRM-16	Equity Case Files	Includes information and records relating to all equity issues such as gender; questionnaires and plans; race relations; and strategies. Includes case files for staff, students, stakeholders.	File Closed Date	10 Years**		Human Resources Management/ Labour/Employee Relations/ Employee Equity Issues	

Information Management Services

CLASSIFICATION CODE	ACTIVITY	DESCRIPTION	RETENTION TRIGGER	RETENTION PERIOD	SUGGESTED METADATA	GRRS REFERENCE	EXCLUSION CONT'D
IMS-01	Records Management Program	Includes information regarding the management of corporate records, regardless of medium. Specific records include file listings, classification structures, feasibility studies, and records centre operations.	Superseded Date	Dispose	Year, Approval Date	Administration/ Records & Archives Management/ Archives Management	
IMS-02	Records Disposition	Includes records regarding the disposition of records. Includes the disposal method used and forms authorizing and describing the destruction of records.	Disposition Date	Life of the Board	Year, Approved By, Approval Date	Administration/ Records & Archives Management/ Records Disposition	
IMS-03	Access & Privacy Requests for Information	Includes requests and tracking sheets for Freedom of Information Requests made under the Municipal Freedom of Information Act. Requests for access to student/employee records and information. Includes routine disclosure requests and processing, notices of disclosure, responses to FOI requests, access request transfers, FOI requests. Also includes lists of Personal Information Banks (PIBs).	File Closed Date	2 Years	Year, Request ID	Administration/ Access & Privacy/ Access Requests for Information	
IMS-04	Information Breaches	Tracking sheets. Records relating to the resolution of breach.	File Closed Date	2 Years	Privacy Breach ID	Administration/ Access & Privacy/ Information Breaches	

Information Technology Services

CLASSIFICATION CODE	ACTIVITY	DESCRIPTION	SUGGESTED RETENTION TRIGGER	TOTAL RETENTION (# OF YEARS AFTER CURRENT YEAR)	SUGGESTED METADATA	GRRS REFERENCE	NOTES
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Legend:
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** - Subject to Archival Selection; D – Dispose

Subject to Archival Selection - Identifies records that may preserve history and may be of value for inclusion in archives. Where school boards do not have an official archive, consideration should be given to maintaining the records permanently.

Administration Management

CLASSIFICATION CODE	ACTIVITY	DESCRIPTION	SUGGESTED RETENTION TRIGGER	TOTAL RETENTION	SUGGESTED METADATA	GRRS REFERENCE	NOTES
ITS-01	Software/Hardware Evaluation and Documentation	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. Also includes acceptance/compatibility criteria, modeling, final specifications and supporting documentation.	File Closed Date (life of system)	6 Years		Administration/Information Technology/Functional, Technical Specifications AND Administration/Information Technology/Information System and Architecture	
ITS-02	Telecommunications Systems	Includes records regarding all types of telecommunications systems. Includes telephone systems, facsimile machines, base and mobile stations, towers, antennae. Also includes configuration details.	Superseded Date	D	Responsible Department	Administration/Information Technology/Telecommunications Systems	
ITS-03	Access Control Passwords and Audit Logs	Includes records related to individual access, password management.	File Closed Date	3 Years	Program/Application, Username	Administration/Information Technology/ Access Control and Password Records	
ITS-04	System Backups	Includes backups of systems stored onsite or offsite.	Calendar Year End Date	1 Year		Administration/Information Technology/Backup Tapes	
ITS-05	Helpdesk Support Requests	Includes records regarding the performance of typical daily helpdesk functions for the board. Records include helpdesk submissions background documentation submitted by the user, scripts used by the helpdesk to respond to inquiries.	Calendar Year End Date	1 Year		Administration/Information Technology/ IT Helpdesk	
ITS-06	Cyber Security Logging	Firewall (Internet, Network, Email, VPN) Network infrastructure and security appliance access logs. Log files can be used for analysis, metrics and for investigations.	File Closed Date	2 Years	Calendar Year End Date	NEW	
ITS-07	Deactivated Student Accounts	Include Microsoft office suite, Google workspace accounts.	File Closed Date	1 Year	Student Number, Student Name	NEW	
ITS-08	Deactivated Employee Accounts	Include Microsoft office suite, Google workspace accounts.	File Closed Date	5 Years	Employee Number, Employee Name	NEW	
ITS-09	IT Project Management	Consists of project management records including project charter, budget, plans and schedules, communications materials for change management, progress reporting and draft or working versions of deliverables.	Project Completion Date	5 years	Project Document Type: budget, schedule, project charter, progress report	NEW	
ITS-10	Data Migration: Enterprise systems	Consists of project close-out report from large-scale data migration projects that verifies that the steps taken were sufficient to ensure data integrity. These records are used to demonstrate the integrity of data that has been migrated to another database or system.	Project Completion Date	2 Years **Excludes backup and migration of individual device data (e.g. individual laptops)**	Project Document Type: budget, schedule, project charter, progress report	NEW	
ITS-11	Asset Management: Disposition	Consists of records relating to the decommissioning of IT assets through sale to students, faculty, staff or another organization. Includes receipts, correspondence relating to the sale.	File Closed Date (Life of Asset)	2 Years		NEW	
ITS-12	Asset Management: Current Configuration	Consists of a record of the current configuration settings, installed software, users of each asset, along with a snapshot of configuration and assignment when it was first distributed. Created from combined data drawn from Heat and LANDesk.	File Closed Date	2 Years		NEW	
ITS-13	Asset Management: Inventory	Consists of inventory of hardware assets distributed to students, faculty and staff. For each asset, a record is kept of assigned configuration, software, individual it is assigned to and purchase orders.	File Closed Date	2 Years		NEW	
ITS-14	User Access: Audit	Consists of records of comparison of actual assigned access credentials within systems to requests submitted by users and records of proper credentials for users. Includes reports of audit results and actions taken to correct any discrepancies.	File Closed Date	2 Years		NEW	
ITS-15	User Access: Requests	Consists of requests for user access modifications submitted by authorized personnel.	Calendar Year End Date	1 Year		NEW	

Legal Services Management

CLASSIFICATION CODE	ACTIVITY	DESCRIPTION	SUGGESTED RETENTION TRIGGER	TOTAL RETENTION (# OF YEARS AFTER CURRENT YEAR)	SUGGESTED METADATA	GRRS REFERENCE	EXCLUSION CONT'D
LEG-01	Appeals and Hearings	Includes records of hearings conducted with regard to issues that affect the school/board. Records include correspondence, reports, discover findings, hearing proceedings and final decisions. Examples: SEAC, IPRC, suspensions and expulsions, boundary reviews.	Resolution Date (after resolution of appeal)	3 Years**	Date of Incident	Governance and Legal/ Agreements/ Risk Management/ Accident/Appeals and Hearings	
LEG-02	Legal Claims/ Litigation	Includes all litigation and insurance claims.	Resolution Date (after resolution of appeal)	3 Years**	Received Date	Governance and Legal/ Agreements/ Risk Management/ Legal Claims/ Litigation	
LEG-03	Contracts and Agreements	Records include contracts and collective agreements such as equipment rental and service contracts, vehicle lease, purchase agreements and consulting service agreements.	Contract End Date	10 Years **	Vendor	Governance and Legal/ Agreements/Contracts Administration/ Contracts & Agreements	
LEG-04	Insurance Policies	Includes records relating to policies to cover loss or damage to property or premises and to cover staff and general public against injury or death resulting from accidents on school/board premises, or otherwise occurring during employment. Documentation regarding the annual review of insurance policies, certificates, appraisals, and related correspondence.	File Closed Date (policy expiry)	Life of the Board + 5 Years	Policy Type	Governance and Legal/ Agreements/ Risk Management/ Accident/Insurance Policies	

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Administration Management							
CLASSIFICATION CODE	ACTIVITY	DESCRIPTION	SUGGESTED RETENTION TRIGGER	TOTAL RETENTION	SUGGESTED METADATA	GRRS REFERENCE	NOTES
LEG-05	Opinions and Briefs	Includes copies of opinions and briefs prepared by internal or external legal counsel on specific issues.	File Closed Date	Life of the Board + 5 Years		Governance and Legal/ Agreements/ Risk Management/ Legal Opinions/ Precedents	
LEG-06	Precedents	Includes records regarding judgments and decisions which may affect position in actual or potential legal matters.	File Closed Date	Life of the Board + 5 Years		Governance and Legal/ Agreements/ Risk Management/ Legal Opinions/ Precedents	
LEG-07	Accident/Incident Claims and Reports	Includes reports related to student, volunteer, and visitor accidents that occur on board 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. Includes reports to insurer.	Resolution Date	3 Years Note: resolution of claim or report No further appeal +3 years for adults Note: If student is under the age of 21, records must be kept until 21st birthday	Claim ID	Governance and Legal/ Agreements/ Risk Management/ Accident/Incident Claims and Reports	
LEG - 08	Property Damage/Trespassing Reports	Includes reports and general correspondence regarding property damage, theft, or loss. Also includes vandalism reports, copies of repair invoices, monthly & annually	File Closed Date	6 Years		Governance and Legal/ Risk Management/ Property Damage/Trespassing Reports	
Program Design and Development							
CLASSIFICATION CODE	ACTIVITY	DESCRIPTION	SUGGESTED RETENTION TRIGGER	TOTAL RETENTION (# OF YEARS AFTER CURRENT YEAR)	SUGGESTED METADATA	GRRS REFERENCE	EXCLUSION CONT'D
PDD-01	Program and Curriculum Planning and Guidelines	Includes records regarding the planning and implementation of curriculum programs, program outlines, program reviews, curriculum guidelines and directives specifying curriculum and areas of study or courses of study that shall be taught in schools. Also includes procedures for the selection, approval, purchase, and distribution of school textbooks, learning materials, reference and library books and lists of these materials and books. Includes recorded information regarding proposals for new curriculum programs, either system-wide or at the school level; comparisons with programs in other school board, provinces, and countries; the planning of the overall curriculum or specific programs, such as meeting notes, objective, strategy reports and teaching strategies; program review reports and other evaluations of specific programs in the curriculum; and proposals, correspondence and monitoring of projects for the writing of special curriculum materials. Includes EQAO test results for schools/boards.	File Closed Date	3 Years**		Program Design and Development/ Curriculum Design & Planning/ Program/Curriculum Guidelines	
PDD-02	Courses of Study and Outlines	Includes outlines of available programs including courses of study.	File Closed Date	3 Years **		Program Design and Development/ Curriculum Design & Planning/ Courses of Study and Outlines	
PDD-03	Program Development and Design	Records include proposals, correspondence and curriculum development materials including writing projects, teaching units, lesson plans, blank examinations, testing ideas, songs, games, music sheets and other learning materials.	File Closed Date	3 Years		Program Design and Development/ Program Development and Design/ Program Development and Design	
PDD-04	Continuing Education Program	Records include: objectives, lesson units, principal reports, program reviews, teaching materials and related records used in continuing education programs for credit and also heritage awareness, second language, multicultural, seniors programs.	File Closed Date	3 Years		Program Design and Development/ Program Development and Design/ Continuing Education Program	
PDD-05	Community Programs and Services	Records related to programs and services to the community through school and board/authority facilities. Programs include general interest courses and services to the community. Generally refers to programs that are not part of day-school.	End of School Year	3 Years		Program Design and Development/ Program Development and Design/ Community Programs and Services	
PDD 06	Curriculum Projects, Programs, Planning Proposals & Review	Includes records information regarding proposals for new curriculum programs, either system-wide or at the school level; comparisons with programs in other school board(s), province(s) and other countries; the planning of the overall curriculum or specific programs, such as meeting notes, objective, strategy reports and teaching strategies, program review report(s), and other evaluations of specific programs in the curriculum, and proposals, correspondence and the special curriculum materials. Include EQAO test results for schools and boards	S/O + 3 years	S/O = last Min review of audit Last report 5 yrs post retirement		Program Design and Development/ Program Development and Design/ Curriculum Projects, Programs, Planning, Proposals, and Review	
Planning and Research Management							
CLASSIFICATION CODE	ACTIVITY	DESCRIPTION	TOTAL RETENTION (# OF YEARS AFTER CURRENT YEAR)	SUGGESTED METADATA	GRRS REFERENCE	EXCLUSION CONT'D	EXCLUSION CONT'D
PRM-01	Enrolment	Records include all counts and projections, including the Official Projected Enrolment, documenting enrolments in the school system.	10 Years		Planning and Research/ Research Design & Planning/ Enrolment		

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Administration Management							
CLASSIFICATION CODE	ACTIVITY	DESCRIPTION	SUGGESTED RETENTION TRIGGER	TOTAL RETENTION	SUGGESTED METADATA	GRRS REFERENCE	NOTES
PRM-02	School Boundaries	Includes records related to the establishment of school boundaries for purposes of enrolment and facility use, including boundary descriptions, school attendance areas, and maps.	Life of Board + 5 Years		Planning and Research/ Research Design & Planning/ School Boundaries		
PRM-03	Student Demographics	Includes records such as: aggregate reports profiling the characteristics of the student population, such as age, grade, promotion, country of birth, religion, and other trend data.	10 Years		Planning and Research/ Research Design & Planning/ Student Demographics		
PRM-04	Municipal Planning and Development	Includes records regarding planning and development issues within the Municipality that may have implications on enrolments within the school system. General information and documentation regarding other municipal planning and development issues such as sewage and waste management, property acreages, subdivision plans, official plan amendments, zoning changes, Ontario Population Reports and traffic studies.	10 Years		Planning and Research/ Research Design & Planning/ Municipal Planning and Development		
PRM-05	Accommodations Planning	Includes records regarding the allocation of classroom and work space assignment to all staff and students. Includes planning of the effects of enrolment on accommodations, projected use of facilities and space utilization, the planning of the functional space and number of classrooms and the planning of the physical layout of the space.	10 Years		Planning and Research/ Research Design & Planning/ Accommodations Planning		
PRM-06	Research	Includes surveys, questionnaires and research dealing with a variety of topics such as Community and Parent research, Student research, Staff research, Curriculum & Program research, Student research and External research from external sources such as other institutions and graduate students.	10 Years**		Planning and Research/ Research & Outcomes Reporting/ Research		
PRM-07	Ministry Reports	Records includes statistical reports, September school reports, June Board reports or other reports required by or send to the Ministry of Education as part of the funding or process for the preparation of educational statistics.	10 Years		Planning and Research/ Research & Outcomes Reporting/ Ministry Reports		
Student Services							
CLASSIFICATION CODE	ACTIVITY	DESCRIPTION	TOTAL RETENTION (# OF YEARS AFTER CURRENT YEAR)	SUGGESTED METADATA	GRRS REFERENCE	EXCLUSION CONT'D	EXCLUSION CONT'D
SSS-01	Student Admission, Registration and Enrolment	Records include: Registration forms, data verification forms, applications for school entry or special programs such as French Immersion.	2 Years		Student Services/ Student Admission/Registration/Enrolment/ Student Registration and Verification Forms		
SSS-02	International Students - Admission, Enrolment and Registration	Records include: Registration forms, applications for school entry, assessment information, admissions letters, visa information, guardian information (if available), immigration information, health information. Represents fee-paying and non-fee paying international students.	6 Years		Student Services/ Student Admission/Registration/Enrolment/ International Students - Admission, Enrolment and Registration		
SSS-03	Attendance & Enrolment Registers: Elementary	Includes records such as: printout of the year-end enrolment register Enrolment Summaries for Full-Time and Part-Time pupils that are certified as accurate by the principal, printout of the Monthly Enrolment Summaries for Full Time pupils for the October and March count dates and at year-end that are certified as accurate by the principal, enrolment Details Records, that are certified as accurate by the principal, Daily Attendance Records for each pupil The Daily Absence Report (Daily Telephone Contact List). Includes registers and reports concerning the enrolment/attendance of students, recording of daily attendance, and daily absence reports. Intent to be absent forms, supporting absence documentation. Also includes course calendars, class registers for non-school system programs such as continuing educations, driver education and heritage language programs.	2 Years		Student Services/ Student Admission/Registration/Enrolment/ Attendance & Enrolment Registers: Student		
SSS-04	Attendance & Enrolment Registers: Secondary	Pupil course timetables that were in effect on the last school day of October and March, or the 16th day of a quadmester or octomester (if applicable) • Support for FTE calculation for October and March count dates. • The period-by-period attendance check for all pupils in the school. • Where applicable, the Independent Study and Online Learning Register for Day School Pupils • Dated forms authorizing pupils to add or withdraw from courses, signed by the principal or by a school staff member designated by the principal. • School course calendars and student handbooks • A list of pupils enrolled in alternative programs. • A list of pupils enrolled in other specific programs. list of pupils enrolled in cooperative education courses. • Documentation required for the community placement component of cooperative education courses to support a minimum of 110 hours per credit (sum of classroom component and community placement component)	2 Years		Student Services/ Student Admission/Registration/Enrolment/ Attendance & Enrolment Registers: Student		
SSS-05	Attendance Counselling	Records for students who are referred for counselling on attendance problems. Includes referral, consents, meeting notes and a summary. Also includes Supervised Alternative Learning (SAL) records.	5 Years		Student Services/ Student Support & Wellness/ Attendance Counselling		Education Act
SSS-06	Career Counselling/Guidance Services	Records includes information concerning career counselling and guidance services. Also includes records of individual students who are referred for career assessment and guidance such as results of vocational interest tests and exercises, counselling records, interview notes, etc.	1 Year		Student Services/ Student Support & Wellness/ Career Counselling/ Guidance Services		

CLASSIFICATION CODE		ACTIVITY	DESCRIPTION	SUGGESTED RETENTION TRIGGER	TOTAL RETENTION	SUGGESTED METADATA	GRRS REFERENCE	NOTES
SSS-07		Guidance Materials	Records includes brochures, calendars, description sheets and catalogues relating to career opportunities, external school programs, post-secondary education, private schools, and scholarships to support students.	1 Year		Student Services/ Student Support & Wellness/ Guidance Materials		
SSS-08		Student Portfolio (IPP - Individual Pathways Plan)	IPP becomes the primary planning tool that students use as they proceed through school towards their initial postsecondary destination. Ongoing development of the IPP provides students a valuable archive of their learning and a catalogue of the resources they need for planning.	5 Years		Student Services/ Student Support & Wellness/ Student Portfolio Individual Pathways Plan (IPP)		
SSS-09		Child & Youth Counsellors/Workers	Records, correspondence and information relating to individual students who are referred for counselling/ behaviour management, such as referral forms, consent forms, notes.	10 Years		Student Services/ Student Support & Wellness/ Child and Youth Counsellors/ Workers		
SSS-10		Student Welfare	Information and records relating to correspondence and confidential reports regarding individual students where there is suspicion of child abuse, neglect or family violence. Student referral/action form for suspicion of child abuse to child protection agency.	1 Year		Student Services/ Student Support & Wellness/ Student Welfare		
SSS-11		Individual Education Plans (IEP)	An IEP is a written plan (hard copy and electronic) describing the special education program and/or services required by a particular student. It identifies learning expectations that are modified from or alternative to the expectations given in the curriculum policy document for the appropriate grade and subject or course, and/or any accommodations and special education services needed to assist the student in achieving his or her learning expectations. A signed hard copy of the IEP is retained in the student's OSR until superseded.	1 Year		Student Services/ Student Assessment & Progress/ Individual Education Plans (IEP)		
SSS-12		Student Exams/Province-wide Tests	Includes records regarding student exams and/or province-wide testing. Records include correspondence, exam day schedules, exam day attendance and originals of completed student examinations, and master copies of blank exams. Also includes OSSLC (Literacy Course) student portfolio.	1 Year		Student Services/ Student Assessment & Progress/ Student Exams/Province-Wide Tests		
SSS-13		Newcomer Student Assessments	Includes assessments of individual newcomer students to determine their language background, immigration status, educational history, test results and recommendations for level placement and subjects.	5 Years		Student Services/ Student Assessment & Progress/ Newcomer Student Assessments		
SSS-14		Student Support Services Case Files	Includes Psychological Services Records, Mental and behavioural Health, Speech & Language Student Services records and Social Worker services records. Such as assessments, referral forms, test results, recommendations and programming suggestions and reports.	10 Years		Student Services/ Student Assessment & Progress/ Speech & Language Student Services Student Services/ Student Assessment & Progress/ Psychological Services Records		
SSS-15		Specialized Equipment Needs (SEA)	Includes records related to the funding to assist boards with the costs of equipment essential to supporting students with special education needs where the need for specific equipment is recommended by a qualified professional. This equipment is to provide students with the accommodations that are required to enable them to access the Ontario curriculum and/or a board-determined alternative program and/or course, and/or to attend school. Eligibility criteria are outlined in the ministry document Special Education Funding Guidelines: Special Equipment Amount (SEA).	5 Years		Student Services/ Student Assessment & Progress/ Specialized Equipment Needs		
SSS-16		Student Health Records	Includes medical and health information regarding students required for the care and treatment of students in the school setting. Includes pediculosis, medical emergency plans - Plan of Care, administration of medication plans, referral for care and other health related materials.	1 Year		Student Services/ Student Assessment & Progress/ Student Health		
SSS-17		Ontario Student Records (OSR) - Active	Includes all content prescribed according to the Ministry of Education OSR Guidelines, board processes, and at the discretion of the principal. The following components of the OSR will be retained for five years after a student retires from school: Report cards, The documentation file, where applicable, Record of accumulated instruction in French/ Indigenous as a second language, Additional information that is identified by the school board as appropriate for retention	5 Years		Student Services/ Student Records Administration/ Ontario Student Record (OSR) - Active		
SSS-18		Ontario Student Records (OSR) - Inactive	Purged OSR, cover and transcript.	50 Years		Student Services/ Student Records Administration/ Ontario Student Records (OSR) - Inactive		
SSS-19		Office Index Card	Includes all office index cards containing personal information, as well as retirement/transfer information on individual students, which is available for immediate access and as OSR backup information.	55 Years		Student Services/ Student Records Administration/ Office Index Card		

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Administration Management

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Administration Management							
CLASSIFICATION CODE	ACTIVITY	DESCRIPTION	SUGGESTED RETENTION TRIGGER	TOTAL RETENTION	SUGGESTED METADATA	GRRS REFERENCE	NOTES
SSS-20	Experiential Learning Student Records	Includes records of individual students participating in cooperative education work assignments, such as copies of work education agreements, introductions cards for employer interviews, training plans and applications for programs. Also includes Supervised Alternative Learning (SAL) Records. Also includes (OYAP) Ontario Youth Apprenticeships Program records.	5 Years		Student Services/ Student Records Administration/ Co-operative Education Student Records Student Services/ Student Records Administration/ Experiential Learning Student Records		
SSS-21	Community Involvement Activities	Records regarding the completion of the required secondary school community service hours completed by students.	5 Years		Student Services/ Student Records Administration/ Community Involvement Activities Form 40 Hours		
SSS-22	Continuing Education Records	Includes mature student appraisals, marks and other student-centered records for continuing education courses. Includes Certificate of Program Completion, and Prior Learning Assessment (PLA).	55 Years		Student Services/ Student Records Administration/ Continuing Education Student Records		
SSS-23	Student Marks	Records relating to student marks (computer and/or manual registers) and related promotion meetings data, such as: course marks analysis, credits received, information of students' courses completed (including special education) and marks received.	5 Years		Student Services/ Student Records Administration/ Student Marks		
SSS-24	Student Expulsions	Includes records related to student expulsions. Also includes records related to the follow-up intervention plan (files with safe schools department or board equivalent)	5 Years		Student Services/ Student Discipline/ Expulsions		
SSS-25	Student Suspensions	Includes records related to student suspensions. Also includes records related to the follow-up intervention plan (files with safe schools department or board equivalent)	3 Years		Student Services/ Student Discipline/ Suspensions		
SSS-26	Incidents Not Resulting in Suspension or Expulsion	Includes records related to incidents not resulting in a suspensio or expulsion.	1 Year		Student Services/ Student Discipline/ Incidents Not Resulting in Suspension or Expulsion		
SSS-27	Threat Assessment Process Documentation	Includes records related to the Follow-up Intervention Plan (filed with safe schools department or Board equivalent), Case Conference Form (filed in the OSR).	1 Year **		Student Services/ Student Discipline/ Threat Assessment Process Documentation		
SSS-28	Nutrition	Includes records related to nutrition planning such as milk programs, breakfast programs and litterless lunch programs.	1 Year		Student Services/ Student Activities & Programs / Nutrition		
SSS-29	Student Bus Transportation Services	Includes records related to transportation/busing of students to and from schools, field trips and special programs. May include schedules, requests for transportations, bus routes, boundaries and student lists.	1 Year		Student Services/ Student Activities & Programs / Transportation: Student Bus Services		
SSS-30	Student Exchanges	Records include correspondence, plans, schedules and reports related to the student(s) participating in student exchange.	1 Year		Student Services/ Student Activities & Programs / Student Exchanges		
SSS-31	Student Extra-Curricular/Co-Curricular Activities	Includes records related to student activities that are part of school life such as field trips, school dances, competition, correspondence, plans and schedules. Also includes requests, consent forms, school field trips, festivals, track meets, tournament, and science fairs.	2 Years ** archival review		Student Services/ Student Activities & Programs / Student Extra-Curricular/Co-Curricular Activities		
SSS-32	Scholarships, Bursaries and Awards - Non-monetary	Record regarding names of awards, information on awards, such as engraving, selections criteria, candidate nominations and recommendations, names of candidates, and related records that document the selection process of awards and scholarships. Also includes Ontario Scholar lists.	1 Year ** archival review		Student Services/ Student Activities & Programs / Scholarships, Bursaries & Awards – Non-monetary		
SSS-33	Volunteer Programs	Includes records related to volunteer programs such as: Annual Receptions, After School Programs, Child Video Identification Program. Also includes recruitment workshops, Signed Application forms and Volunteers Assisting Teachers (VAT).	1 Year		Student Services/ Student Activities & Programs / Volunteer Programs		
SSS-34	Extended Day Administration	Includes records related to current year such as program planning, participant information such as attendance, demographics, emergency contact information, confirmation of extended day funding, extended day binder report, extended day binders and vacation tracker.	1 Year		Student Services/ Student Activities & Programs / Extended Day Administration		
SSS-35	Concussion Protocol Records	Includes records that demonstrate the school/board identification, and monitoring and management of a student with a concussion.	5 Years		Student Services/ Student Activities & Programs/ Concussion Protocol Records		
SSS-36	Student Exemptions and Accommodations	Records related to students exempted or accommodated from the following. • Exemption from Instruction related to the Human Development and Sexual Health Expectations in The Ontario Curriculum: Health and Physical Education, Grades 1–8, 2019. • Opt out of Online learning graduation requirement. • religious accommodation • accommodation of gender/preferred name	5 Years		Student Services/ Student Activities & Programs / Student Exemptions and Accommodations		

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Administration Management							
CLASSIFICATION CODE	ACTIVITY	DESCRIPTION	SUGGESTED RETENTION TRIGGER	TOTAL RETENTION	SUGGESTED METADATA	GRRS REFERENCE	NOTES
SSS-37	Notice of Intent for Home Schooling	Signed form indicating a student will be withdrawn to be home-schooled.	2 Years		Student Services/ Student Records Administration/ Notice of Intent for Home Schooling		
SSS-38	Timetables	Includes course timetables for students, as well as course selection sheets for each semester. Also includes signed and dated forms authorizing students to add or withdraw from courses. Excludes School Course Calendars.	2 Years		Student Services/ Student Records Administration/ Timetables		
SSS-39	Supervised Alternative Learning (SAL) Records	Includes records of individual students who make application to a SAL program.	5 Years		Student Services/ Student Records Administration/ Supervised Alternative Learning (SAL) Records		
SSS-40	OYAP Participant Application Form	Form for co-op students whose placement is within an apprenticeship trade.	5 Years		Student Services/ Student Records Administration/ OYAP Participant Application Form		