



RETENTION SCHEDULE 2200

RECORDS AND INFORMATION MANAGEMENT AND ACCESS REQUESTS

RECORDS AND INFORMATION MANAGEMENT CLASSIFICATION SYSTEM/ RETENTION SCHEDULE

The following retention schedule outlines the minimum amount of time that School District No. 6 (Rocky Mountain) records must be retained and who is responsible for their retention and destruction.

FINANCIAL RECORDS	
Responsibility: Finance Department	
Annual budget and summary supporting documents	Permanent
Auditor’s reports	Permanent
Cancelled cheques	7 years after the year of creation
Cheque duplicates, invoices, requisitions, purchase orders	7 years after the year of creation
Employee travel claims	7 years after the year of creation
Ministry of Education financial information reports	Permanent
General ledger	Permanent
Invoices billed	7 years after the year of creation
Subsidiary ledgers and journals	7 years after the year of creation
Receipts issued	7 years after the year issued
Bank statements, debit and credit notes	7 years after the year of creation
Deposit books / cash receipts	7 years after the year of creation
Loans, authorization	7 years or term of loan, if longer
Loans, cancelled notes	7 years after the year of creation
Stop payment orders	1 year after the year of creation

[POLICY 2200 RECORDS AND INFORMATION MANAGEMENT](#)
[DISTRICT PRACTICE 2200 RECORDS AND INFORMATION MANAGEMENT](#)
[FORM 2200 RECORDS AND INFORMATION MANAGEMENT ACCESS REQUEST](#)

REFERENCES: [School Act](#), [FOIPPA](#)

ADOPTED: January 2021, October 2022, June 2023, December 2023



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HUMAN RESOURCE RECORDS	
Responsibility: Human Resources Department	
Applications and job competitions	1 year after position is filled
Collective agreements with unions	Permanent
Contracts with individual employees	7 years after the year employee leaves the School District
Employee files	7 years after the year employee leaves the School District
First aid certification	7 years after the year employee leaves the School District
Leave records	7 years after the employee leaves School District
Individual grievance files	Permanent
Letters of discipline	According to collective agreement or 7 years after the year employee leaves the School District
Personnel file	7 years after the year employment ceases
Reference checks	1 year after position is filled
ERP Records	1 year after employment ceases
ERP - TOC Dispatch	1 year
Seniority lists	Permanent
Support staff subs	1 year
Unsolicited resumes	7 months
Violent incident reports	7 years after the year of creation

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INFORMATION SYSTEMS	
Responsibility: Information Systems	
User IDs	When user is removed from the system
System problem tracking	When user is removed from the system
Electronic communications (email)	15 months from when an item is created or received

PAYROLL RECORDS	
Responsibility: Payroll Department	
Employee payroll register	7 years after the year employee leaves the District
Employee attendance records	7 years after the year employment ceases
Payroll benefits	7 years after the year employment ceases
Payroll database	7 years after the year employment ceases
Payroll deductions	7 years after the year employment ceases

RISK MANAGEMENT	
Insurance policies	Useful Life
Accident reports - Students	Useful Life
Accident reports - Employees	6 years after the year of creation

BUILDINGS & PROPERTY	
Appraisal and inventory records	Indefinite
Capital expenditure authorization	Indefinite
Plans, specifications, and related documents	Indefinite
Titles and deeds	Indefinite
Borrowing authority (e.g. Orders-in-Council)	Indefinite
Leases	Indefinite

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STUDENT RECORDS	
Student information system data Responsibility: Information Systems	Permanent
Permanent record cards Responsibility: Schools	Permanent
Attendance reports and registers Responsibility: Schools	Permanent
Out-of-boundary attendance requests Responsibility: Assistant Superintendent Office	1 year after decision is made about the request
Provincial scholarships and district awards Responsibility: Assistant Superintendent	Permanent
Senior secondary school statement Responsibility: Secondary Schools	Permanent
Teachers' student files Responsibility: Teacher	1 year after teacher no longer has student (selected records transferred to Primary Student File)
Other student records Responsibility: Schools, Student Support Services	Useful life of record
Student psychology records Responsibility: School Psychologist	7 years past age of majority or 7 years past date of the last professional service rendered. (as per College of Psychologists of BC Code of Conduct s. 13, s. 14)
Student counseling records Responsibility: Schools, Student Support Services	7 years past age of majority or 7 years past date of the last professional service rendered.

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GENERAL ADMINISTRATION	
Insurance Claims	Indefinite
Miscellaneous Reports WorkSafe BC, fire marshall, health, boiler inspection, etc.)	Indefinite

CORPORATE SERVICES	
Board policy	Indefinite
Board committee reports	Indefinite
Board minutes (open and closed meetings)	Indefinite
Wage and salary agreements	Indefinite
List of electors	2 years
General notices	1 year
Oaths and declaration	Specified Term of Office

OTHER	
General Correspondence	3 years after the year of creation
Field trip proposals	5 years
Field trip permission forms	1 year

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