

School Retentions

What is a record? A ‘record’ means a record of information in any form regardless of its medium. Records include books, documents, maps, drawings, photographs, letters, vouchers and papers and any other information that is written, photographed, recorded or stored in any manner.

Some **questions** to ask yourself to determine where a record should be filed and/or whether it needs to be kept and for how long:

Do I require these records to do my day to day business?

Are these the original or primary records?

Can I get these records in any other part of the organization, eg. Central Office?

Do these records have Historical, Business or Legal value?

Are these transitory records?

Records Management Abbreviations & Terminology:

S/O – Superseded/Obsolete – once new documentation is received, the old documentation is filed in archives or destroyed, depending upon retention period assigned. *S/O + 1 / D*, etc –in this example the record is superseded obsolete, kept an additional 1 year then destroyed.

D- Destroy – once document has met its retention period, it can be destroyed.

S/R – selective retention – once the document has met its retention period, it is reviewed for disposition. If you wish to keep the document longer, you may. If the document is no longer of use, you may destroy it.

OP –out of province

IP – in province

NL – providing there is No Litigation

COMP – retain until completion/end of term. Ex: contract

COMP + 7/D – retain 7 years after completion then Destroy

TERM – upon termination

FYE – fiscal year end

PERM – permanent retention

Transitory- will have a short life span during which they serve a particular purpose but are not required to provide evidence of decision-making and can then be destroyed

Financial Records - all records that are created and managed by the school independent of Central Office (SGF, bank records, cheque book, etc)	- 7 years/ Destroy
Financial Records - that are managed by Central Office but copies are retained at the school (Petty Cash, PO's, Visa, Expense Claims, etc)	- 2 years/ Destroy
Addresses of Students	- S/O / Destroy
All Field Trip Forms/Documents	-FYE- 3/ Destroy – provided there is no incident - FYE +10 years archive/ SR – if there is an incident - if litigation, keep permanent
Class Discipline File	- current year + 1 year/ Destroy
Class Lists	- current year + 1 year / Destroy
Classroom Exams/Tests- completed grade tests Grade 1-9	- term + 0/ Destroy
Deceased Student Files	- 7 years / Destroy
Diploma exams/ Achievement Tests	- 5 years / Destroy
PowerSchool - electronic copy- grades 10-12	-stays in PASI perm
Fire Drill Logs	- S/O + 10 years/ Destroy
Lesson Plans	- current year + 1year/ Destroy
Notes from Parents- such as bus changes, leaving school early, pick-ups/ changes, appointments, etc. K – Grade 9 Grades 10 -12	- current year/ Destroy – provided no incident - Destroy after event occurs
Parent Contact Letters	- 2 years/ Destroy
Recorded Score Tests – Ex: Schonell	-current year + 1year / Destroy
Report Cards	- copy in CUM File (Mandatory)
School Annual Education Results Report	-5 years/ Destroy
School Calendars	- 10 years/ Destroy
Student Contact Information	- S/O / Destroy
School Council Meeting Minutes	- 7/D
School Emergency Response Plan	- S/O + 10 years / Destroy

School Inventory Form	- 3 years/ Destroy
School Newsletters	- current year + 3 year/ Destroy
Staff Meeting Agendas	- FYE / Destroy
Staff Meeting Minutes	- FYE + 1 year/ Destroy
Staff Timesheets (school copies)	- current year + 1 year/ Destroy
Student Marks K- Grade 9	- current year + 1 years/ Destroy
Student Marks Grade 10 – 12 CEU's \$	- current year + 7 years/ Destroy
Student Attendance	- an attendance summary to be put in CUM file annually (Mandatory)
Student Confidential File	- until student reaches 26 years of age/ Destroy
Student Cumulative File	- until student reaches 26 years of age/ Destroy
Student Enrolment	- until student reaches 26 years of age/ Destroy (Mandatory in CUM file)
Student IPP (Individual Program Plan)	- until student reaches 26 years of age/ Destroy (current year in Confidential file/ then put into CUM file)
Student Medical Release Forms	FYE + 10 years/Destroy - if litigation keep permanent
Student Modules (Grades 10-12)	-current year + 1 year/ Destroy
Student File Transfer Request Form	-keep until student reaches 26 years of age/Destroy
Student File Transfer Request – In Province send original CUM file	- until student reaches 26 years of age/ Destroy
Student File Transfer Request – Out of Province send copy of CUM file and keep original	- until student reaches 26 years of age/ Destroy
Student Union Meeting Minutes	- FYE + 7 years/ Destroy
Teacher Plan Books	-CYE + 1 year/ Destroy
Text Books	- S/O / Destroy
Timetables	- current year + 1 year/ Destroy