

CODE	Function	Activity	Record Series	Description	Accountability	Total Retention	Trigger	Disposition	Inclusion in OSR	Citations	Comments
ADM-ACP-001	Administration	Access & Privacy	Access Requests for Information	Includes requests and tracking sheets for Freedom of Information Requests made under the Municipal Freedom of Information and Protection of Privacy Act (MFIPPA). Excludes routine requests for access to student / employee records and information.	Privacy, Records, and Information Management / School / HR / Originating Department	E + 2 years	E = Expiry of Appeal Period	Destroy		Ont.1, Ont.2, Ont. 4	PIB (Final response letters, Archival review) MFIPPA-O Operational value
ADM-ACP-002	Administration	Access & Privacy	Access Requests for Student and Employee Information	Includes routine requests for access to student / employee records and information, including all correspondence. Excludes access requests under MFIPPA	Privacy, Records, and Information Management	E + 1 year	E = Expiry of Appeal Period	Destroy		Ont.1, Ont.2, Ont. 4	PIB
ADM-ACP-003	Administration	Access & Privacy	Information Breaches	Tracking sheets, case file notes, and records relating to the management and resolution of the breach.	Privacy, Records and Information Management	E + 2 years	E = Final resolution of Breach	Destroy		Ont.1, Ont.2, Ont. 4	PIB
ADM-ITS-001	Administration	Information Technology	Abandoned Teams content	Includes records and messaging related to abandoned Microsoft Teams channels, chats, and files.	I.T. Services	CY + 1 year	CY = Current Year	Destroy			
ADM-ITS-002	Administration	Information Technology	Access Control and Password Records	Records related to the management of and access to programs and accounts. Includes individual access, password management, etc.	I.T. Services	E + 1 year	E = Termination of Employee	Destroy			Operational Value
ADM-ITS-003	Administration	Information Technology	Backups - IT Systems	Backups of network and system drives managed by Board.	I.T. Services	60 Days	E = Backup	Destroy			Operational value Legal value
ADM-ITS-004	Administration	Information Technology	Computer and Information Systems	Records related to system architecture and maintenance, includes all documentation & correspondence; end user support (helpdesk) tickets, database administration and all electronic system decision-making correspondence.	I.T. Services	S/O + 2 years	S/O = Life of system	Destroy			Considered highly sensitive.
ADM-ITS-005	Administration	Information Technology	Disaster Recovery	Records related to disaster recovery planning and implementation.	I.T. Services	S/O	S/O = Superseded or Obsolete	Destroy			Operational Value
ADM-ITS-006	Administration	Information Technology	Hard Drives	Includes devices such as hard drives that have been wiped of sensitive or personal information	I.T. Services	S/O	S/O = Superseded or Obsolete	Destroy			
ADM-ITS-007	Administration	Information Technology	User Accounts	Includes contents of a user's account, e.g., staff member email, network drive, cloud storage, etc. Excludes Director, Executive, Superintendent, or Board member accounts.	I.T. Services	CY + 1 year	CY = Current Year	Destroy			
ADM-ITS-008	Administration	Information Technology	User Accounts - Director, Executive, Superintendent	Includes contents of a user's account, e.g., email, network drive, cloud storage, etc. Excludes user accounts for non-executive staff, etc.	I.T. Services	CY + 10 years	CY = Current Year	Archival Review			

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ADM-MTG-001	Administration	Meetings Management	External Meetings: Associations / Organizations / Government	Includes reports, newsletters, publications, conference and workshop information and proceedings from meetings between the school board and external organizations. Also includes records of external committees and councils on which board and school staff members participate as members. Records include agendas, reports, resolutions and any documentation which reflects obligations of the Board.	Originating Site	CY + 4 years	CY = Current Year	Destroy			Operational Value
ADM-MTG-002	Administration	Meetings Management	Internal Meetings: Administrative and Staff	Includes records regarding staff meetings, student council and committees such as principals' council, secretaries' meetings, as well as district and subject head meetings. Records include agendas, minutes, reports, and resolutions. Excludes Board Minutes, and governance committees (e.g., admin. council, exec. council, etc.).	Originating Site or Meeting Chair	CY + 4 years	CY = Current Year	Destroy			Operational Value
ADM-RAM-001	Administration	Records & Archives Management	Archives Management	Policies and procedures regarding archives management; includes record inventories and policy-related correspondence. Also includes information regarding the management of records, regardless of medium. Records include Classification Scheme, Legal Citation Table, file lists, lists of records in storage, records management reports and related correspondence.	Privacy, Records, and Information Management	S/O + 1 year	S/O = Superseded or Obsolete	Archival Review			Legal value Vital record
ADM-RAM-002	Administration	Records & Archives Management	Forms Management	Includes final version of forms history, creation, revision, and retirement date. Excludes convenience or reference copies.	Originating Department	S/O + 1 year	S/O = Superseded or Obsolete	Archival Review			
ADM-RAM-003	Administration	Records & Archives Management	Records Disposition	Lists of stored and destroyed records, retention schedules.	Privacy, Records and Information Management	Permanent	N/A	Archival Review		Ont. 31	Legal value Vital Record
COM-EVT-001	Communications & Public Relations	Event Management	Events, Ceremonies, and Celebrations	Includes memos, notices, correspondence with parents and others, programs and all related materials pertinent to events sponsored by the board or by schools (e.g. parents' night, school opening ceremonies, reunions, etc.). Records include program schedules, correspondence, brochures, and event activity details.	Communications / Site Specific	CY + 4 years	CY = Current Year	Archival Review			PIB Operational Value
COM-MED-001	Communications & Public Relations	Media & Public Relations	Commendations, Awards, and Recognition	Includes commendations received from the general public and parents regarding various programs and the treatment of students, certificates of appreciation, and awards recognizing of staff. Excludes Staff Awards, Certificates, and Bursaries	Communications / Site Specific	CY + 2 years	CY = Current Year	Archival Review		Ont. 1, Ont. 2, Ont. 4	PIB

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COM-MED-002	Communications & Public Relations	Media & Public Relations	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, or privacy-related complaints under MFIPPA.	Originating Department	E + 1 year	E = Date of complaint	Destroy		Ont. 1, Ont. 2, Ont. 4	PIB MFIPPA-O
COM-MED-003	Communications & Public Relations	Media & Public Relations	Contact and Mailing Lists	Includes all lists of individuals or organizations to whom Board and school communications are sent for information purposes or with whom the Board and school communicate. Records include mailing lists, emergency contact lists, and student lists, telephone directories, principal's visitor book, emergency contact lists, etc. Excludes student information system.	Originating Department	S/O	S/O = when lists are updated	Destroy		Ont. 4	PIB Operational value
COM-MED-004	Communications & Public Relations	Media & Public Relations	Media Relations and News Releases	Includes records regarding Board relations with various media outlets. Records include press releases and information releases, speeches, photographs, correspondence, media contact logs, etc.	Originating Department	CY + 4 years	CY = Current Year	Archival Review			PIB Operation value
COM-MED-005	Communications & Public Relations	Media & Public Relations	News Reports	Includes news reports from newspapers, magazines, websites, and other publications regarding the Board / authority, school, staff, students, and trustees. Applies to News Reports Board employees receive from external sources. May be paper or electronic.	Originating Department	CY + 3 years	CY = Current Year	Archival Review			PIB Operational value
COM-MED-006	Communications & Public Relations	Media & Public Relations	Photographs	Includes class photos, yearbook photos, and officials / trustees group photos. Also includes photographs, slides, videotapes, CDs, DVDs, recordings, etc. that document school and board activities.	Communications / Originating Department	CY + 1 year	CY = Current Year	Archival Review		Ont. 1, Ont. 2, Ont. 4	PIB
COM-MED-007	Communications & Public Relations	Media & Public Relations	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.	Communications	CY + 1 year	CY = Current Year	Destroy		Ont. 1, Ont. 2, Ont. 4	PIB
COM-MED-008	Communications & Public Relations	Media & Public Relations	Publications: External	Includes all publications produced for the Board by the Communications Department. Also includes publications, artwork and copies of advertisements placed by the board or schools. Excludes website records.	Communications / Originating Department	S/O + 5 years	S/O = Superseded or Obsolete	Archival Review		Ont. 1, Ont. 2, Ont. 4	PIB Operational value

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COM-MED-009	Communications & Public Relations	Media & Public Relations	Publications: Internal	Includes records and artwork for publications such as yearbooks, curriculum handbooks, school handbooks, school calendars, "Welcome to Elementary School" booklets, annual reports, brochures on programs offered by schools, newsletters, and other school promotions.	School or Originating Department	Permanent	N/A	Archival Review			PIB Operational value
COM-MED-010	Communications & Public Relations	Media & Public Relations	Speeches and Presentations	Includes speeches and presentations prepared for delivery by Board / school staff and elected officials and teachers covering non-classroom topics.	Originating Department	CY + 4 years	CY = Current Year	Archival Review			Operational value
COM-MED-011	Communications & Public Relations	Media & Public Relations	Staff Awards, Certificates, and Bursaries	Includes records relating to special recognition and awards presented to staff. Excludes Commendations, Awards, and Recognition.	Communications / Site Specific	CY + 2 years	E = Date of event	Archival Review		Subject to inclusion in the employee record.	PIB MFIPPA-O
COM-MED-012	Communications & Public Relations	Media & Public Relations	Website Content	Includes snapshots of website content and copies of web pages created by school boards for general public use. Includes Board and school sites.	Originating Department	CY + 4 years	CY = Current Year	Archival Review			Operational Value Legal Value
COM-COL-001	Communications & Public Relations	School Personal Collections	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 material, etc. For Photographs See: Photographs & Multimedia Materials For yearbooks, See: Publications: Internal	School or Originating Department	CY + 1 year	CY = Current Year	Archival Review		Ont. 4	PIB Retained at school site when school is open, when school closes all items are sent to the CEC Records Centre for archival purposes. Operational value
FAC-PRO-001	Facilities Management	Assets, Property Management, and Maintenance	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 by the municipality, Fire Marshal's Office, Ministry of Education, Ministry of Health, and other government bodies.	Facilities and Planning	E + 15 years	E = As long as building remains Board property	Destroy		Ont. 35, Ont. 55, Ont. 142, Ont. 143, Ont. 145, Ont. 150, Ont. 174, Ont. 184, Ont. 190, Ont. 194	BCA-O FPPA-O TSSA-O Operational value Legal Value
FAC-PRO-002	Facilities Management	Assets, Property Management, and Maintenance	Drawings and Specifications	Includes technical specifications for a project or property, e.g., mechanical, electrical, and structural. Includes building and fire code requirements and architects' 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.	Facilities and Planning	E + 15 years	E = As long as building remains Board property	Archival Review		Ont. 15, Ont. 35	Vital RPLA-O

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FAC-PRO-003	Facilities Management	Assets, Property Management, and Maintenance	Environment Assessments and Studies	Includes information relating to soil, tree preservation and mitigation, geotechnical infrastructure expansion, water, air, and other environmental issues.	Facilities and Planning	Permanent	N/A	Permanent		Ont. 221, Ont. 332	BCA-O FPPA-O TSSA-O
FAC-PRO-004	Facilities Management	Assets, Property Management, and Maintenance	Facilities Construction Projects	Includes 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. For Capital Projects Financing See: Capital Projects Financing For Final (As-Built) Drawings See: Drawings & Specifications Excludes capital projects financing and financial records related to construction disbursements.	Facilities and Planning	E + 6 years	E = Completion of project	Archival Review		Ont. 8, Ont. 10, Ont. 15, Ont. 124, Ont. 194	Documents identified in the archival review as having long-term value can be retained indefinitely. Refer to "Memorabilia" series
FAC-PRO-005	Facilities Management	Assets, Property Management, and Maintenance	Facilities Improvement Projects	Includes project records regarding the building improvements program and supporting documents specific to additions, renovations, and alterations to schools and buildings. Records include project drawings, project plans, meeting minutes, project updates, budgets, etc. For Final (As-Built) Drawings See: Drawings & Specifications	Facilities and Planning	E + 6 years	E = Completion of project	Destroy		Ont. 8, Ont. 9, Ont. 10, Ont. 11, Ont. 15, Ont. 17, Ont. 19, Ont. 20, Ont. 55, Ont. 175, Ont. 184, Ont. 185, Ont. 190, Ont. 194	Upon project completion, certain records may be transferred to building maintenance and operations files for ongoing operational support. BCA-O ITA-C ITA-O ETA-C FPPA-O RPLA-O
FAC-PRO-006	Facilities Management	Assets, Property Management, and Maintenance	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 design documents and layouts, furniture layouts, etc. See Also: Facilities Planning - Reports, Layouts, and Reviews for FINAL Records	Facilities and Planning	CY + 4 years	CY = Current Year	Archival Review			Retain electronic correspondence for 5 years. Operational value
FAC-PRO-007	Facilities Management	Assets, Property Management, and Maintenance	Facilities Planning - Reports, Layouts, and Reviews	Includes final enrolment studies and reports, facilities design documents and layouts, facilities use plans, and boundary reviews. See also: Facilities Planning / FAC-PRO-006	Facilities and Planning	Permanent	N/A	Archival Review			

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FAC-PRO-008	Facilities Management	Assets, Property Management, and Maintenance	Land Surveys	Includes land survey information such as legal property surveys, construction layout and control surveys, and field notes. Also includes soil-boring reports.	Facilities and Planning	S/O	S/O = Superseded or Obsolete	Archival Review			Ensure that land surveys are available at local registry office before destruction. Operational value
FAC-PRO-009	Facilities Management	Assets, Property Management, and Maintenance	Maintenance and Operations: Buildings / Physical Plant and Equipment	Includes records related to supporting the maintenance and operations of buildings, physical plant, and equipment. Includes office equipment.	Facilities and Planning	E + 5 years	E = Disposal of facility or equipment	Destroy		Ont. 9, Ont. 10, Ont. 11, Ont. 17, Ont. 18, Ont. 20, Ont. 141, Ont. 142, Ont. 145, Ont. 146, Ont. 147, Ont. 148, Ont. 149, Ont. 150, Ont. 151, Ont. 163, Ont. 164, Ont. 165, Ont. 175, Ont. 177, Ont. 178, Ont. 179, Ont. 180, Ont. 182, Ont. 183, Ont. 184, Ont. 185, Ont. 190, Fed. 15	FPPA-O TSSA-O
FAC-PRO-010	Facilities Management	Assets, Property Management, and Maintenance	Maintenance and Operations: Grounds	Maintenance requisitions, work orders, logs and reports showing actions taken re: grounds keeping, snow clearance, and cleaning. Maintained in EBASE (Work orders, logs, and inspections)	Facilities and Planning	CY + 2 years	CY = Current Year	Destroy		Ont. 34	Operational value Maintained in EBASE (Work orders, logs, and inspections)
FAC-PRO-011	Facilities Management	Assets, Property Management, and Maintenance	Permits / Facility Bookings	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. Maintained in EBASE	Facilities and Planning / Originating Department	CY + 6 years	CY = Current Year	Destroy		Ont. 1, Ont.2, Ont. 4, Ont. 34	PIB Operational value Maintained in EBASE
FAC-PRO-011	Facilities Management	Assets, Property Management, and Maintenance	Vehicles / Fleet Management	Includes records of all vehicles currently owned, operated and, maintained by the Board.	Facilities and Planning	E + 2 years	E = Life of vehicle	Destroy			CAI-O LA-O

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FAC-HEA-001	Facilities Management	Health, Safety, and Security	Accessibility of Services and Information	Records relating to the accessibility of services and provision of information to persons with disabilities. Includes records that identify, remove and prevent barriers for persons who work, learn or volunteer in, and / or use services in Board facilities.	Director's Office	CY + 6 years	CY = Current Year	Destroy		Ont. 1, Ont. 2, Ont. 4	
FAC-HEA-002	Facilities Management	Health, Safety, and Security	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. For HR Training Records See: Training & Skills Development	Human Resources / Facilities	CY + 3 years	CY = Current Year	Destroy		Ont. 152, Ont. 153, Ont. 154, Ont. 155, Ont. 156	Note: Must ensure that the two most recent reports are retained OHSA-O
FAC-HEA-003	Facilities Management	Health, Safety, and Security	Designated Substances and Hazardous Materials - Waste Monitoring and Management	Includes records related to the management and disposal of chemical, biological or physical agents, or substances.	Health and Safety / Facility Services	E + 5 years	E = Date of report	Archival Review		Ont. 181, Ont. 196, Ont. 197, Ont. 215, Ont. 216, Fed. 45	Vital OHSA-O
FAC-HEA-004	Facilities Management	Health, Safety, and Security	Emergency Plans and Procedures	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 for lockdowns and business continuity plans. Include call lists, supplier / vendor contacts, and related reports. See Also: Emergency Plans and Procedures - Lessons Learned Reports	Facilities / School	S/O + 5 years	S/O = Superseded or Obsolete	Archival Review		Ont. 19, Ont. 32, Ont. 103, Ont. 143, Fed. 9, Fed. 10, Fed. 15, Fed. 42, Fed. 43, Fed. 44	Vital Operational value
FAC-HEA-005	Facilities Management	Health, Safety, and Security	Emergency Plans and Procedures - Lessons Learned Reports	Includes final lessons learned reports related to Emergency Plans and Procedures. See Also: Emergency Plans and Procedures.	Facilities / School	Permanent	N/A	Archival Review		Ont. 19, Ont. 32, Ont. 103, Ont. 143, Fed. 9, Fed. 10, Fed. 15, Fed. 42, Fed. 43, Fed. 45	
FAC-HEA-006	Facilities Management	Health, Safety, and Security	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. Includes air quality reports, and noise exposure reports. Also includes training records pertaining to the use of chemicals. Excludes exposure records of workers.	Health and Safety / Facility Services	Permanent	N/A	Permanent		Ont. 37, Ont. 38, Ont. 39, Ont. 40, Ont. 158, Ont. 163, Ont. 164, Ont. 166, Ont. 167, Ont. 168, Ont. 169, Ont. 176, Ont. 177, Ont. 178, Ont. 220, Fed. 42, Fed. 43, Fed. 44, Fed. 45, Fed. 46, Fed. 47, Fed. 48, Fed. 49	OHSA-O

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FAC-HEA-007	Facilities Management	Health, Safety, and Security	Health and Safety Incident Reports (kept at each school)	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, and information related to actions taken by staff. For Serious Student Incidents See: Student Discipline Excludes employee medical health records (personally identifiable records). See also: HUM Employee Incident / Accident Reports For Accident Reports, See: Accident / Incident Claims and Reports For Claims / Litigation, See: Legal Claims / Litigation	Health and Safety / Human Resources / School	E + 6 years	E = No further appeal or, after 21st birthday	Destroy		Ont. 1, Ont. 2, Ont. 4	PIB
FAC-HEA-008	Facilities Management	Health, Safety, and Security	Occupational Health & Safety	Includes general recorded 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.; includes revisions or new versions. For Accident Reports, See: Accident / Incident Claims and Reports For Claims / Litigation, See: Legal Claims / Litigation	Health and Safety	CY + 3 years	CY = Current Year	Destroy		Ont. 1, Ont. 2, Ont. 4	
FAC-HEA-009	Facilities Management	Health, Safety, and Security	Site Security Administration	Includes records regarding the security of office and school facilities and properties such as control of keys, trespassing, surveillance reports, emergency telephone numbers / contacts, and police station locations. Also includes and contractor logs, etc. Excludes school visitor book, video surveillance system records.	Facilities	CY + 2 years	CY = Current Year	Destroy		Ont. 1, Ont. 2, Ont. 4, Ont. 19	PIB EA-O MFIPPA-O
FAC-HEA-010	Facilities Management	Health, Safety, and Security	Video Surveillance - Not Viewed	Includes video footage captured but not viewed.	Schools	60 Days	N/A	Destroy			Not viewed
FAC-HEA-011	Facilities Management	Health, Safety, and Security	Video Surveillance Footage - Viewed - Used by the Institution	Includes video surveillance footage that is captured, viewed, and used. Excludes video surveillance used for other purposes. e.g. access to information requests, investigations, insurance claims etc. Also excludes video surveillance footage that is captured but not viewed.	Schools	60 Days	N/A	Destroy		MFIPPA, R.R.O. 1990, Reg. 823: General s.5	PIB Viewed footage

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FAC-HEA-012	Facilities Management	Health, Safety, and Security	Video Surveillance Reports - Viewed not used	Includes reports and footage captured through the use of video surveillance in schools and buses. Includes viewed footage.	Schools	60 Days	N/A	Destroy		Ont. 1, Ont. 2, Ont. 4	PIB Viewed footage
FAC-INS-001	Facilities Management	Inspections and Testing	Fire Protection Systems and Emergency Power Systems	Includes records regarding the inspection and testing of emergency power systems, fire extinguishers, and fire protection systems.	Facilities	CY + 6 years	CY = Current Year	Destroy		Ont. 141, Ont. 145, Ont. 147, Ont. 148, Ont. 149, Ont. 150, Ont. 151, Ont. 180, Ont. 184, Ont. 185, Ont. 188, Ont. 189, Ont. 190	FPPA-O
FAC-INS-002	Facilities Management	Inspections and Testing	Logs and Inspection Reports: General	Includes all documentation to support the inspection and testing of buildings, equipment, physical plants, 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. For Emergency Power Systems Inspections and Testing, See: Fire Protection Systems & Emergency Power Systems For Fire Protection Logs and Testing See: Fire Protection Systems & Emergency Power Systems	Facilities	CY + 6 years	CY = Current Year	Destroy		Ont. 9, Ont. 11, Ont. 17, Ont. 18, Ont. 20, Ont. 121, Ont. 122, Ont. 123, Ont. 124, Ont. 125, Ont. 126, Ont. 127, Ont. 128, Ont. 129, Ont. 130, Ont. 179, Ont. 189	FPPA-O SDWA-O TSSA-O
FAC-INS-003	Facilities Management	Inspections and Testing	Health and Safety Inspection Reports	Includes records of inspections carried out by the Health and Safety Committee in accordance with the Occupational Health and Safety Act.	Health and Safety (Board Office) Health and Safety (kept at each School)	E + 6 years	E = New report	Destroy		Ont. 9, Ont. 11, Ont. 17, Ont. 18, Ont. 20, Ont. 121, Ont. 122, Ont. 123, Ont. 124, Ont. 125, Ont. 126, Ont. 127, Ont. 128, Ont. 129, Ont. 130, Ont. 179, Ont. 189	Note: A minimum of two inspection reports must be retained. OHSA-O
FIN-ACC-001	Financial Management	Accounting Administration	Accounts Payable	Includes records documenting funds payable by the Board, such as invoices, employee and trustee expenses, legal fees, vendor transaction listings, payment vouchers, cheque requisitions, utilities and phone bills, petty cash disbursements. PIB for staff and board expense.	Corporate Services	CY + 6 years	CY = Current Year	Destroy		Ont. 1, Ont. 2, Ont. 4, Ont. 14, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38	PIB ETA-C ITA-C ITA-O ECA-O MFIPPA-O

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FIN-ACC-002	Financial Management	Accounting Administration	Accounts Receivable	Records related to the accounting for money owed to schools and boards. Records include invoices, cash receipts, correspondence, cash lists, and statements of account.	Corporate Services	CY + 6 years	CY = Current Year	Destroy		Ont. 14, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38	Vital ETA-C ITA-C ITA-O ECA-O
FIN-ACC-003	Financial Management	Accounting Administration	Banking and Cash Management	Includes records regarding banking transactions and relationships with banks, bank statements, bank reconciliations, deposit records, cancelled cheques, returned cheques, and cheque stubs. Excludes transitory records of submissions supporting payment processing.	Corporate Services / Schools	CY + 6 years	CY = Current Year	Destroy		Ont. 14, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38	Vital ETA-C ITA-C ITA-O ECA-O
FIN-ACC-004	Financial Management	Accounting Administration	Capital Revenue	Includes records related to capital revenue from sale of property and rental income from leased premises and other sources.	Corporate Services	CY + 6 years	CY = Current Year	Destroy		Ont. 14, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38	Vital ETA-C ITA-C ITA-O ECA-O
FIN-ACC-005	Financial Management	Accounting Administration	Funding: Non-Board	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. Includes school generated funds (SGF) and other non-board funding. Includes records regarding the raising of funds for charitable organizations, completed contribution forms, promotional materials for fundraising and reports.	Schools / Originating Department	CY + 6 years	CY = Current Year	Destroy		Ont. 14, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38	ETA-C ITA-C ITA-O ECA-O
FIN-ACC-006	Financial Management	Accounting Administration	Grants and Subsidies	Information and records relating to all grants and subsidies for Federal, Provincial, and Municipal bodies.	Corporate Services / Schools / Originating Department	CY + 6 years	CY = Current Year	Destroy		Ont. 1, Ont. 2, Ont. 4	
FIN-ACC-007	Financial Management	Accounting Administration	Scholarship Funds, Bequests & 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. See Also: Scholarships, Bursaries, and Awards - Non-Monetary	Finance	Permanent	N/A	Permanent		Ont. 1, Ont. 2, Ont. 4	PIB
FIN-PLA-001	Financial Management	Financial Planning	Budgets	Includes departmental and Board budgets, both capital and operating. Includes all working notes, budget formula calculations, current estimate highlights, and preliminary formula budget calculation sheet summaries, and budgeted vs. actual reports.	Corporate Services	CY + 6 years	CY = Current Year	Destroy			ETA-C ITA-C ITA-O ECA-O

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FIN-PLA-002	Financial Management	Financial Planning	Capital Projects	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.	Corporate Services	E + 10 years	E = Completion of project	Archival Review		Ont. 13, Ont. 14, Ont. 139, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 20, Fed. 30, Fed. 38	ETA-C ITA-C ITA-O ECA-O
FIN-REP-001	Financial Management	Financial Reporting	Audits - Financial	Includes records regarding internal and external financial audits of accounts. For Audited Financial Statements See: Financial Statements (Audited)	Corporate Services	CY + 6 years	CY = Current Year	Destroy		Ont. 14, Ont. 99, Ont. 191, Ont. 225, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38	Vital ETA-C ITA-C ITA-O ECA-O
FIN-REP-002	Financial Management	Financial Reporting	Audits - Program	Includes audits of programs, curriculum plans and related board and school activities undertaken by the Ministry of Education.	Originating Department	CY + 6 years	CY = Current Year	Destroy			EA-O
FIN-REP-003	Financial Management	Financial Reporting	Enrolment and 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.	Corporate Services	CY + 6 years	CY = Current Year	Destroy		Ont. 14, Ont. 114, Ont. 225, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38	Vital The current retention period is based on the need to support other financial data. Operational value
FIN-REP-004	Financial Management	Financial Reporting	Financial Statements (Audited)	Includes the balance sheet, income statement, statement of source and application of funds, and other audited financial statements.	Corporate Services	Permanent	N/A	Permanent		Ont. 65, Ont. 198	Vital ETA-C ITA-C ITA-O ECA-O
FIN-REP-005	Financial Management	Financial Reporting	Financial Working Papers	Includes all drafts, calculations, grant calculations, and other working papers associated with the development of financial statements for the Board.	Corporate Services	CY + 6 years	CY = Current Year	Destroy			ETA-C ITA-C ITA-O ECA-O
FIN-REP-006	Financial Management	Financial Reporting	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.	Corporate Services / RDO / Schools	CY + 6 years	CY = Current Year	Destroy		Ont. 14, Ont. 74, Ont. 225, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38	PIB ETA-C ITA-C ITA-O ECA-O
FIN-REP-007	Financial Management	Financial Reporting	Inventory Control: Fixed Assets	Records relating to the balance sheet, including fixed asset listings, depreciation details, asset transfer information, and details of extraordinary entries.	Corporate Services	Permanent	N/A	Permanent		Ont. 14, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38	Vital ETA-C ITA-C ITA-O ECA-O
FIN-REP-008	Financial Management	Financial Reporting	Inventory Control: Non-Fixed Assets	Includes all records regarding inventories of board-owned equipment. Excludes hazardous materials inventories. See Risk Mitigation for system inventories.	Facilities / Procurement	CY + 6 years	CY = Current Year	Destroy		Ont. 14, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38	ETA-C ITA-C ITA-O ECA-O

CODE	Function	Activity	Record Series	Description	Accountability	Total Retention	Trigger	Disposition	Inclusion in OSR	Citations	Comments
FIN-REP-009	Financial Management	Financial Reporting	Ledgers: General	Includes all records in the books of original entry, whether maintained in book format or as a computer report.	Corporate Services	Permanent	N/A	Permanent		Fed. 30, Fed. 37	Vital General ledgers of discontinued or dissolved school boards should be sent to the Ministry of Education.
FIN-REP-010	Financial Management	Financial Reporting	Ledgers: Subsidiary Ledgers, Registers, and Journals	Includes all subsidiary ledgers, registers, and journals such as payment and receipt journals, journal vouchers, payroll registers, purchase order registers, and year-end adjustments.	Corporate Services	CY + 6 years	CY = Current Year	Destroy		Ont. 14, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38	ETA-C ITA-C ITA-O ECA-O LA-O RPLA-O
FIN-REP-011	Financial Management	Financial Reporting	Parking	Includes records allocating parking permits at the schools or the Education Centre such as license plate numbers, permit numbers, or names of users.	Supply Services / School	S/O + 1 year	S/O = Superseded or Obsolete	Destroy			
FIN-REP-012	Financial Management	Financial Reporting	Taxation: Sales and Property Tax Returns and Reports	Includes records documenting taxation such as gas surtax reports, income charity tax returns, federal sales tax tables, and records regarding the raising of funds for charitable organizations. Also includes HST, GST returns, requests for rebate, sales and property tax returns and reports, completed contribution forms, promotional materials for fundraising and reports. Also includes financials on Transportation Consortium.	Corporate Services	CY + 6 years	CY = Current Year	Destroy		Ont. 13, Ont. 14, Ont. 139, Fed. 1, Fed. 2, Fed. 3, Fed. 4, Fed. 6, Fed. 8, Fed. 14, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 20, Fed. 23, Fed. 30, Fed. 36, Fed. 38	ETA-C ITA-C ITA-O ECA-O
FIN-PAY-001	Financial Management	Payroll	Payroll Management	Includes all records of payments of salary, wages, and deductions to employees, payroll master cards, time sheets, direct deposit request forms, payroll update logs, holdbacks, payroll deduction, and billing reports. Also includes T4's, TD's, and ROE's.	Corporate Services	CY + 6 years	CY = Current Year	Destroy		Ont. 1, Ont. 2, Ont. 4, Ont. 16, Ont. 21, Ont. 27, Ont. 131, Ont. 136, Ont. 140, Ont. 170, Ont. 171, Ont. 172, Ont. 206, Ont. 207, Ont. 208, Ont. 209, Fed. 5, Fed. 6, Fed. 7, Fed. 8, Fed. 23, Fed. 25, Fed. 26, Fed. 27, Fed. 30, Fed. 33, Fed. 34, Fed. 40, Fed. 41	PIB Vital ETA-C ITA-C ITA-O ECA-O
FIN-PAY-002	Financial Management	Payroll	Pension Contributions / Support	Includes contribution cards / forms detailing pension and benefits obligations due to retired employees under OMERS and other annuity or superannuation plans (TPP). Includes payroll records required to determine and verify pension payments.	Corporate Services	E + 6 years	E = Until pension is paid out to all beneficiaries	Destroy		Ont. 1, Ont. 2, Ont. 4	PIB Vital ETA-C ITA-C ITA-O ECA-O

CODE	Function	Activity	Record Series	Description	Accountability	Total Retention	Trigger	Disposition	Inclusion in OSR	Citations	Comments
FIN-PRC-001	Financial Management	Procurement	Duplicating / Printing Services	Records relating to translation, audio visual services, duplicating / printing services, mail / courier and delivery services. Includes requests and memos regarding the printing of Board and school documents, publications and forms. Requisitions and memos for services, confirmations and service logs / reports, correspondence, reports, etc. Also includes printing logs.	Supply Services / Originating Department / School	CY + 1 year	CY = Current Year	Destroy			Operational value
FIN-PRC-002	Financial Management	Procurement	Purchase Orders & Purchase Requisition	Includes purchase requisitions, purchase orders and blanket orders authorizing the procurement of goods and services. Does not include any correspondence relating to the purchase. Excludes Tenders and Quotations.	Corporate Services	CY + 6 years	CY = Current Year	Destroy		Ont. 1, Ont. 2, Ont. 4	
FIN-PRC-003	Financial Management	Procurement	Tenders & Quotations	Records regarding tenders & quotations obtained from suppliers of goods & services such as office supplies, construction, pest control, and unsuccessful bids. Requests for proposal, requests for quotations, specifications, bonds, and all documentation regarding the selection process. See CONTRACTS & AGREEMENTS for documentation of successful bids. Excludes vendors / suppliers / caterers and contracts; also Purchase Orders.	Corporate Services	CY + 6 years	CY = Current Year	Destroy		Ont. 1, Ont. 2, Ont. 4	
FIN-PRC-004	Financial Management	Procurement	Vendors / Suppliers / Contractors	Includes information about vendors, contractors and suppliers and their goods and services. Records include catalogues, price lists, and correspondence. Excludes agreements and Supply Services documentation, etc.	Supply Services / Originating Department	S + 1 year	S = Superseded or when new documentation is received from Vendors / Suppliers / Contractors	Destroy			Operational value
GOV-AGR-001	Governance and Legal	Agreements / Contracts Administration	Contracts & Agreements	Includes all records relating to contracts and agreements.	Corporate Services / Originating Department	E + 6 years	E = Contract Terminated or Superseded	Destroy			LA-O
GOV-BOA-001	Governance and Legal	Board and Council Administration	Administrative Council(s)	Includes agendas and minutes all administrative councils, and Executive councils.	Director's Office / Board Secretary	Permanent	N/A	Permanent		Ont. 1, Ont. 2, Ont. 4	PIB Vital
GOV-BOA-002	Governance and Legal	Board and Council Administration	Articles of Incorporation, By-Laws, and Constitution	Includes records related to the operation of the School Board as a legal entity.	Director's Office	Permanent	N/A	Permanent		Ont. 47	EA-O

CODE	Function	Activity	Record Series	Description	Accountability	Total Retention	Trigger	Disposition	Inclusion in OSR	Citations	Comments
GOV-BOA-003	Governance and Legal	Board and Council Administration	Board Agendas, Minutes, and Reports	Records relating to Board minutes, agendas and reports, including all back-up material.	Director's Office / Board Secretary	Permanent	N/A	Permanent		Ont. 47	PIB Vital
GOV-BOA-004	Governance and Legal	Board and Council Administration	Standing and Ad Hoc Committees	Includes agendas and minutes of all Board committees with which staff, students, and trustees are involved.	Director's Office / Board Secretary	Permanent	N/A	Permanent		Ont. 1, Ont. 2, Ont. 4, Ont. 47	PIB Vital
GOV-BOA-005	Governance and Legal	Board and Council Administration	Trustee Management	All records and relevant materials relating to trustee's position on Board. Includes clerk's certificate, elections information, personal information, directories and news items regarding the trustees. Also includes trustees' distribution and orientation information.	Director's Office	E + 4 years	E = End of term	Permanent		Ont.1, Ont.2, Ont.4, Ont. 222	PIB EA-O MFIPPA-O
GOV-BOA-006	Governance and Legal	Board and Council Administration	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.	Director's Office	Permanent	N/A	Permanent		Ont. 1, Ont. 2, Ont. 4	PIB
GOV-POL-001	Governance and Legal	Policies, Procedures, Directives	Guidelines, Policies and Directives: External	Includes documentation about initiatives and guidelines provided by the Ministry of Education. Records include memoranda, directives, and correspondence such as the OSR Guideline, EIC Guidelines, and Ministry Policy / Program Memoranda.	Board Secretary	S/O + 3 years	S = Superseded or when policies and directives are replaced.	Destroy			Board / school can obtain old copies from Ministry if required EA-O
GOV-POL-002	Governance and Legal	Policies, Procedures, Directives	Guidelines, Policies and Directives: Internal	Includes policy and procedure manuals, guidelines and directives, and all other policies and procedures established by the Board, departments and schools. Excludes reference copies.	Originating Department	Permanent	N/A	Permanent		Ont. 81, Ont. 83, Ont. 108, Ont. 119, Ont. 120, Ont. 157	
GOV-POL-003	Governance and Legal	Policies, Procedures, Directives	Intergovernmental Reporting and Communication	Includes correspondence and reports between the board and various levels of government such as the municipality, provincial ministries, etc. Also includes correspondence and information on other school boards.	Originating Department	CY + 6 years	CY = Current Year	Archival Review			EA-O
GOV-RIS-001	Governance and Legal	Risk Management	Accident / Incident Claims & Reports	Includes reports related to students, 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 [OSBIE]. Excludes: litigations, WSIB claims / reports.	Corporate Services	E + 15 years	E = Resolution of claim or report Note: If student is under the age of 21, records must be kept until 21st birthday	Archival Review		Ont. 1, Ont. 2, Ont. 4, Ont. 34	PIB MFIPPA-O LA-O

CODE	Function	Activity	Record Series	Description	Accountability	Total Retention	Trigger	Disposition	Inclusion in OSR	Citations	Comments
GOV-RIS-002	Governance and Legal	Risk Management	Appeals and Hearings	Includes records of hearings conducted regarding issues that affect the school / board. Records include correspondence, reports, discovery findings, hearing proceedings and final decisions. Examples: SEAC, IPRC, suspensions and expulsions, boundary reviews.	Originating Department / Corporate Services	E + 5 years	E = Resolution of appeal or hearing Note: If the student is under the age of 21, records must be kept until 21st birthday	Archival Review		Ont. 1, Ont. 2, Ont. 4, Ont. 34	LA-O MFIPPA-O
GOV-RIS-003	Governance and Legal	Risk Management	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. For Accident Reports See: Accident / Incident Claims and Reports. Excludes insurance claims and accident reports.	Corporate Services	Permanent	N/A	Permanent		Ont. 34	LA-O
GOV-RIS-004	Governance and Legal	Risk Management	Legal Claims / Litigation	Includes all liability claims and litigation against or entered into by the boards / authorities and schools. Records include reports, correspondence, investigations, etc. For Accident Reports See: Employee Incident / Accident Reports. For WSIB / STD / LTD Claims See: Disability Management.	Originating Department / Legal	E + 3 years	E = Resolution of appeal or hearing; or, the 21st birthday of student.	Destroy		Ont. 1, Ont. 2, Ont. 4	PIB
GOV-RIS-005	Governance and Legal	Risk Management	Legal Opinions / Precedents	Records include case law, correspondence, reports, and findings / opinions provided to requestor. Records relating legal opinions and precedents about legal issues identified by the school / board.	Originating Department / Corporate Services	Permanent	N/A	Destroy		Ont. 1, Ont. 2, Ont. 4	
GOV-RIS-006	Governance and Legal	Risk Management	Property Damage / Trespassing Reports	Includes reports and general correspondence regarding property damage, theft, or loss. Also includes vandalism reports, copies of repair invoices, monthly, and annual summaries.	Originating Department / School	E + 6 years	E = Date of damage	Destroy		Ont. 1, Ont. 2, Ont. 4 Ont. 34, Ont. 223	PIB RPLA-O MFIPPA-O

CODE	Function	Activity	Record Series	Description	Accountability	Total Retention	Trigger	Disposition	Inclusion in OSR	Citations	Comments
GOV-RIS-007	Governance and Legal	Risk Management	Risk Mitigation	Records created and maintained to support electronic system risk mitigation activities. Includes asset inventories, system data maps, risk registries, risk score cards, disaster recovery plans, and correspondence relating to risk-related decisions. See: Policies, Procedures, Directives for security policies. See Security Administration for physical security.	I.T. Services	L/S + 3 years	L/S = Life of System	Destroy		Ont. 1, Ont. 2, Ont. 4	
GOV-REA-001	Governance and Legal	Real Property Management	Deeds and Titles	Includes original deeds to any board owned property.	Corporate Services	Permanent	N/A	Archival Review		Ont. 224	RPLA-O
GOV-REA-002	Governance and Legal	Real Property Management	Property Acquisition & Sales	Includes land purchase agreements, development agreements, property appraisals, valuations and quotes concerning land owned by the board or under consideration for purchase. Also includes plans, correspondence, reports, and backup documentation relating to the acquisition or sale of lands.	Corporate Services	E + 20 years	E = Until property is disposed	Destroy		Ont. 7, Ont. 224	RPLA-O
HUM-CMP-001	Human Resources Management	Compensation and Benefit Administration	Benefits Plans: Employee	Includes records regarding benefits offered to employees such as group insurance, dental plans, wellness, and Employee Assistance Program (EAP). Includes brochures, rates, quotes, correspondence, explanatory documents, benefit rate changes, and premium adjustments. Excludes Benefit Records of Specific Employees.	Human Resources	S/O + 1 year	S/O = Superseded or Obsolete	Destroy		Ont. 1, Ont. 2, Ont. 4	Operational value (Now managed by insurance providers)
HUM-CMP-002	Human Resources Management	Compensation and Benefit Administration	Compensation Planning	Includes records regarding the planning and scheduling of salaries, such as Job evaluations, job classification systems, salary surveys and schedules, salary increments, service pay, and substitution pay. See Pay Equity for Pay Equity Planning. Excludes pay equity planning.	Human Resources	CY + 10 years	CY = Current Year	Destroy			Operational value
HUM-CMP-003	Human Resources Management	Compensation and Benefit Administration	Pay Equity	Includes records regarding the establishment and implementation of the board's pay equity plan. Records include background information, consultant information, questionnaires, interview documentation, and job evaluation plans.	Human Resources	S/O + 5 years	S/O = Superseded or Obsolete	Destroy		Ont. 132, Ont. 133, Ont. 134	PIB Operational Value

CODE	Function	Activity	Record Series	Description	Accountability	Total Retention	Trigger	Disposition	Inclusion in OSR	Citations	Comments
HUM-CMP-004	Human Resources Management	Compensation and Benefit Administration	Pension	Includes information and records relating to pension information, such as: General Information on OMERS and other Annuities; Ontario Teachers' Pension Plan; Teacher's Pension Plan Certification; Pension reconciliation balances. Includes general information on OMERS, TPP and other annuity or superannuation plans and annual information returns. Excludes: Individual Employee Information and Pension Contributions / Support; Annual Information Returns;	Finance	Permanent	N/A	Permanent		Ont. 136, Fed. 5, Fed. 30, Fed. 41	Operational value
HUM-WEL-001	Human Resources Management	Health and Wellness	COVID-19 Records	Employee records relating to the COVID-19 pandemic. See Also: reporting to Ministry of Health (MOH) and insurance claims	Human Resources	CY + 2 years	CY = Current Year	Destroy		Attendance, Attestation	Medical Absence note
HUM-WEL-002	Human Resources Management	Health and Wellness	Disability Management	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).	Human Resources	E + 40 years	E = Date first record created in personal exposure record AND: E + 20 years E = Date last record added to personal exposure record	Destroy		Ont. 1, Ont. 2, Ont. 4	PIB Note: Do not store in the employee HR file
HUM-WEL-003	Human Resources Management	Health and Wellness	Employee Incident / Medical Records, Exposure to Hazardous Materials	Includes reports of accident / injury to board employees under the Workplace Safety and Insurance Act and designated substances exposure records under the Occupational Health and Safety Act. Records may include: doctor's notes, follow-up notes and related correspondence, and short- and long-term disability claims for both teaching and support staff and record of administration of first aid. Includes records of staff exposure to hazardous materials. See Also Accident / Incident Claims & Reports Excludes incidents involving non-employees	Human Resources	E + 40 years	E = Date first record created in personal exposure record AND: E + 20 years E = Date last record added to personal exposure record	Destroy		Ont. 1, Ont. 2, Ont. 4, Ont. 36, Ont. 158, Ont. 159, Ont. 160, Ont. 161, Ont. 169, Fed. 22	PIB
HUM-LAB-001	Human Resources Management	Labour / Employee Relations	Administration of Labour Relations / Non-Union Conditions	Includes records regarding the actual administration and interpretation of the board's collective agreements, including seniority lists, implementation plans, sub plans, and related records. Excludes Grievances, Collective Agreements, Certification Documents & Negotiations.	Human Resources	Permanent	N/A	Archival Review			Operational Value

CODE	Function	Activity	Record Series	Description	Accountability	Total Retention	Trigger	Disposition	Inclusion in OSR	Citations	Comments
HUM-LAB-002	Human Resources Management	Labour / Employee Relations	Employee Discipline	Records related to employee discipline measures.	Human Resources	CY + 3 years	CY = Current Year				PIB Retain CY + 3 years if no further related reports
HUM-LAB-003	Human Resources Management	Labour / Employee Relations	Employment Equity Program	Includes records and historical information regarding employment equity. Includes information and records relating to all equity issues such as gender, questionnaires and plans, race relations, and strategies. See Respect in the Workplace for Harassment Incidents	Human Resources	E + 3 years	E = Termination of Plan	Archival Review			MFIPPA-O
HUM-LAB-004	Human Resources Management	Labour / Employee Relations	Grievances	Includes records regarding grievances filed by employees such as evaluation reports, notifications, correspondence with union concerning grievance initiators & legal opinions. Includes arbitrations.	Human Resources	Permanent	N/A	Permanent			PIB Operational value
HUM-LAB-005	Human Resources Management	Labour / Employee Relations	Harassment Complaints, Allegations and Investigations (Respect in the Workplace)	Harassment includes acts of violence and vexatious comments or conduct against a worker in a workplace because of sex, sexual orientation, gender identity or gender expression, where the course of comment or conduct is known or ought reasonably to be known to be unwelcome. Includes: records of incidents involving staff and students, incident reports, investigations, and correspondence regarding these issues. Excludes: Appeals/Hearings	Human Resources	E + 10 years	E = Retirement Date	Permanent		Ont. 1, Ont. 2, Ont. 4	PIB Operational value
HUM-LAB-006	Human Resources Management	Labour / Employee Relations	Labour Relations & Negotiations, Union / Non-Union	Includes records related to collective bargaining, e.g., final offers, memoranda of settlement, mediations, arbitrations, and data used in preparation for bargaining. Includes: Collective Agreements and original documents concerning the certification of labour unions.	Human Resources	Permanent	N/A	Archival Review			Operational Value
HUM-ORG-001	Human Resources Management	Organizational Planning	Human Resources Planning	Includes records of succession planning & retirement programs such as Early Retirement Incentive Program, staff turnover, staff mobility, and related records.	Human Resources	CY + 5 years	CY = Current Year	Archival Review			MFIPPA-O
HUM-ORG-002	Human Resources Management	Organizational Planning	Organization Structure	Includes records relating to reporting relationships, organization structure, organization analysis, etc. For both schools and school boards. Includes organizational charts and school profiles.	Director's Office	S + 1 year	S = Superseded or when organization structure changes	Archival Review			EA-O

CODE	Function	Activity	Record Series	Description	Accountability	Total Retention	Trigger	Disposition	Inclusion in OSR	Citations	Comments
HUM-ORG-003	Human Resources Management	Organizational Planning	Staffing	Includes all report listings concerning staff, e.g., staff allocation, staff transfers, staff directories, sub-sections of seniority lists, retirement lists, and lists of occasional staff.	Human Resources	CY + 5 years	CY = Current Year	Archival Review		Ont. 1, Ont. 2, Ont. 4	EA-O
HUM-REC-001	Human Resources Management	Recruiting and Selecting	Job Descriptions	Includes job descriptions and specifications as well as background information used in their preparation or amendment. Also includes positions of responsibility.	Human Resources	S + 2 years	S = Superseded or when new job descriptions are written	Archival Review			Operational Value
HUM-REC-002	Human Resources Management	Recruiting and Selecting	Recruitment	Includes records regarding the recruitment of staff, job postings, applications, resumes and applicant evaluations. Successful applicants are moved to the Employee File. Includes copies of advertisements, competitions, and resumes of candidates selected for interviews.	Human Resources	E + 5 years	E = Closing date of posting	Destroy		Ont. 1, Ont. 2, Ont. 4	PIB Operational Value
HUM-STF-001	Human Resources Management	Staff Management	Attendance - Employee	Includes records regarding leaves, sabbaticals, special leaves, teacher exchanges, deferred salary. Forms part of the Employee file. Vacation taken is reported in HRIS systems.	Human Resources	Permanent	N/A	Permanent			PIB (After 2006, employees make declaration in WESS via check box) EA-O MFIPPA-O
HUM-STF-002	Human Resources Management	Staff Management	Criminal 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.	Human Resources	E + 10 years	E = Termination of employment / volunteer service	Destroy		Ont. 1, Ont. 2, Ont. 4, Ont. 56	PIB MFIPPA-O EA-O

CODE	Function	Activity	Record Series	Description	Accountability	Total Retention	Trigger	Disposition	Inclusion in OSR	Citations	Comments
HUM-STF-003	Human Resources Management	Staff Management	Criminal Offence Declarations	Annual offence declarations, signed by the employee/service provider, which lists all criminal code convictions registered since the date of the last offence declaration or the CBC.	Human Resources	E + 10 years	E = Termination of employment / volunteer service	Forward to HR on termination		Ont. 1, Ont. 2, Ont. 4, Ont. 56	PIB Note: When an employee is transferred to another school/ workplace within the Board, or the employee is terminated or retired, the file shall be forwarded to Human Resources Department. HR staff will inspect the file to ensure that "only
HUM-STF-004	Human Resources Management	Staff Management	Employee File	Includes only those records that relate to a board employee that a principal / supervisor "needs to know" in order to administer their supervisory responsibilities. Includes records regarding the employment history of the board or school employees. Includes initial resume and applications, internal applications, benefit enrollment forms, salary calculation forms, change advice, employee master record cards, certification of level placement, probationary contract, key tasks, and employee verification forms. Includes teaching and support staff. Excludes employee records relating to the OMERS pension plan	Human Resources	E + 10 years	E = Termination of employment	Forward to HR on termination		Ont. 1, Ont. 2, Ont. 4, Ont. 207, Ont. 209	PIB Note: When an employee is transferred to another school/ workplace within the Board, or the employee is terminated or retired, the file shall be forwarded to Human Resources Department. HR staff will inspect the file to ensure that "only
HUM-STF-005	Human Resources Management	Staff Management	Employee Performance Appraisals	Includes records of job performance appraisals on all employees according to established timelines and criteria through board procedures.	Human Resources	E + 10 years	E = Summative reports of performance appraisals to which records relate	Destroy		Ont. 1, Ont. 2, Ont. 4, Ont.57, Ont. 79, Ont. 80, Ont. 84, Ont. 85, Ont. 88, Ont. 89, Ont. 90, Ont. 91, Ont. 94, Ont. 95, Ont. 96, Ont. 97	PIB MFIPPA-O EA-O To be filed in the Employee File.

CODE	Function	Activity	Record Series	Description	Accountability	Total Retention	Trigger	Disposition	Inclusion in OSR	Citations	Comments
HUM-TRA-001	Human Resources Management	Training and Skills Development	Professional Development Programs and Materials	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. Excludes employee confirmation of attendance or participation, date-stamped records employees confirm via checkbox in WESS/ISYS	Originating Department	CY + 3 years	CY = Current Year	Archival Review			PIB MFIPPA-O
HUM-TRA-002	Human Resources Management	Training and Skills Development	Training Records	Record of participation or completion of board staff development including internal and external training events, seminars and workshops. Includes training mandated by Ministry of Education under s.8.2 of the Education Act. Included in Employee file as Seperate Folder	Human Resources	E + 10 years	E = Termination of employment	Forward to HR on termination			PIB MFIPPA-O
PLA-RES-001	Planning and Research	Research Design and Planning	Accommodations Planning	Includes records regarding the allocation of classroom, portable, and workspace assignment to all staff and students. Includes planning for the effects of enrolment on accommodation, facility utilization, functional space requirements, and physical layout of spaces.	Planning	CY + 10 years	CY = Current Year	Destroy		Ont. 1, Ont. 2, Ont. 4	Operational value
PLA-RES-002	Planning and Research	Research Design and Planning	Enrolment	Includes all counts and projections, including the Official Projected Enrolment, documenting enrolments in the school system.	Planning	CY + 4 years	CY = Current Year	Archival		Ont. 1, Ont. 2, Ont. 4	Operational value EA-O
PLA-RES-003	Planning and Research	Research Design and Planning	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.	Research and Planning	S/O + 10 years	S/O = last update	Archival Review		Ont. 1, Ont. 2, Ont. 4	
PLA-RES-004	Planning and Research	Research Design and Planning	School Boundaries	Includes information relevant to the establishment of school boundaries for purposes of enrolment and facility use, including boundary descriptions, school attendance areas, and maps.	Planning	Permanent	N/A	Permanent		Ont. 47	Operational value EA-O
PLA-RES-005	Planning and Research	Research Design and Planning	Strategic Planning	Includes all strategic and operational documents, mandates, as well as related correspondence, background, and reference information. Includes management plans, School Improvement Planning, Business Budget Planning, and Integrated System Plan.	Research and Director's Office	CY + 10 years	CY = Current Year	Archival Review			Operational value

CODE	Function	Activity	Record Series	Description	Accountability	Total Retention	Trigger	Disposition	Inclusion in OSR	Citations	Comments
PLA-RES-006	Planning and Research	Research Design and Planning	Student Demographics	Includes aggregate reports profiling the characteristics of the student population, such as age, grade, promotion, country of birth, religion, and other trend data.	Learning Services	CY + 10 years	CY = Current Year	Destroy			Operational value
PLA-OUT-001	Planning and Research	Research Outcomes and Reporting	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.	Research	CY + 10 years	CY = Current Year	Archival Review		Ont. 1, Ont. 2, Ont. 4	PIB
PLA-OUT-002	Planning and Research	Research Outcomes and Reporting	Research Requests: External	Includes external applications to conduct research from sources such as universities, graduate students, and foundations, and their final reports.	Learning Services	E + 6 years	E = Completion of external research project	Archival Review			
PRG-CUR-001	Program Design and Development	Curriculum Design and Planning	Courses of Study / Outlines	Includes outlines of available programs including courses of study.	Program Services / Principal	S/O + 5 years	S/O = last update	Archival Review		Ont. 45	CA-C
PRG-CUR-002	Program Design and Development	Curriculum Design and Planning	Curriculum Projects, Programs, Planning, Proposals, and Review	Includes recorded information regarding proposals for new curriculum programs, either system-wide or at the school level; comparisons with programs in other school boards, 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.	Program Services / Principal	S/O + 3 years	S/O = Last Ministry review or audit	Archival Review		Ont. 1, Ont. 2, Ont. 4	Operational value
PRG-CUR-003	Program Design and Development	Curriculum Design and Planning	Library Management	Includes records related to board / school library operations and Library Circulation. Records include collection inventories, correspondence, acquisition and disposal planning and strategies, and other records related to library holdings and operations.	Library Services	S/O + 1 year	S/O = Superseded or when inventories are updated and library weeding out is complete	Archival Review			Operational value

CODE	Function	Activity	Record Series	Description	Accountability	Total Retention	Trigger	Disposition	Inclusion in OSR	Citations	Comments
PRG-CUR-004	Program Design and Development	Curriculum Design and Planning	Program / Curriculum 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. Includes e.g., correspondence between ministry, board staff, or third parties.	Program Services / Principal	S/O + 3 years	S/O = last update	Destroy		Ont. 45	MoE creates curriculum, but conversations (e.g. email correspondence, text messages etc.) with the ministry, Board office staff and third parties must be retained) CA-C EA-O
PRG-PRO-001	Program Design and Development	Programs Design and Planning	Heritage Programs	Includes objectives, program reviews, teaching materials and related records used in the education of students in heritage awareness programs.	Learning Services	CY + 4 years	CY = Current Year	Archival Review			Operational value
PRG-PRO-002	Program Design and Development	Programs Design and Planning	Program Development and Resources	Includes curriculum programming support, materials including writing projects, teaching units, lesson plans, testing ideas and other learning materials.	Program Services / Principal	S/O + 5 years	S/O = last update	Archival Review			EA-O Operational value
PRG-PRO-003	Program Design and Development	Programs Design and Planning	Programs and Services: Community	Records related to programs and services to the community programs include general interest courses and services to the community. Generally, refers to programs that are not part of day-school. Includes records such as Education Week, summer arts camp, mentorship for Immigrants and community use of schools, day care services and safety and awareness programs. Also includes program reviews and reports of the activities of community liaison officers.	Program Services/Principal	S/O + 3 years	S/O = last update	Destroy			Operational Value
PRG-PRO-004	Program Design and Development	Programs Design and Planning	Programs: Continuing Education	Includes 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. (Non-OSSD)	Continuing Education / Principal	S/O + 5 years	S/O = last update	Destroy		Ont. 45	Operational value

CODE	Function	Activity	Record Series	Description	Accountability	Total Retention	Trigger	Disposition	Inclusion in OSR	Citations	Comments
STU-ENR-001	Student Services	Student Admission / Registration / Enrolment	Admissions, Transfers, and Retirement of Students	Includes reports and forms recording the transfer, exit, room changes, promotions or admittance of students from schools. Also includes signed and dated forms authorizing student admissions, transfers or retirement of students See Attendance and Enrolment Registers for OSR transfer requests	Schools	CY + 2 years	CY = Current Year	Destroy		Ont. 1, Ont. 2, Ont. 4, Ont. 64, Ont. 114, Ont. 225	PIB MFIPPA-O EA-O Subject to Ministry of Education Audit http://www.edu.gov.on.ca/eng/policyfunding/forms.html%23ec
STU-ENR-002	Student Services	Student Admission / Registration / Enrolment	Attendance and Enrolment Registers: Student	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 class registers for non-school system programs such as continuing education, driver education, and heritage language programs. See Also: Admissions, Transfers, and Retirement of Students Excludes historical records	Schools	CY + 2 years	CY = Current Year	Destroy		Ont. 1, Ont. 2, Ont. 4, Ont. 64, Ont. 114, Ont. 225	PIB MFIPPA-O EA-O Retain for Audit purposes
STU-ENR-003	Student Services	Student Admission / Registration / Enrolment	Attendance and Enrolment Registers: Student [Historical]	Includes registers and reports documenting early operations of the board in the region prior to 1960 Includes International Students	Schools	Permanent	N/A	Permanent			PIB
STU-ENR-004	Student Services	Student Admission / Registration / Enrolment	International Students - Admission, Enrolment and Registration	Registration forms, applications for school entry, assessment information, admissions letters, visa information, guardian information (if available), immigration information, health information, criminal history information. Represents fee-paying and non-fee-paying international students. See Also: Attendance & Enrolment Registers: Students [Historical] for Historical records	Responsible Board-level staff	E + 7 years	E = Retirement of student	Destroy Subject to Ministry of Education Audit http://www.edu.gov.on.ca/eng/policyfunding/forms.html%23ec		Ont. 1, Ont. 2, Ont. 4	PIB
STU-ENR-005	Student Services	Student Admission / Registration / Enrolment	Pupil Eligibility Attestation	Foundation documents used to verify student identification. Excludes: copies of identification used to validate identification	Schools	CY + 6 years	CY = Current Year	Destroy			PIB Subject to Ministry Education Audit

CODE	Function	Activity	Record Series	Description	Accountability	Total Retention	Trigger	Disposition	Inclusion in OSR	Citations	Comments
STU-ENR-006	Student Services	Student Admission / Registration / Enrolment	Student Records: External Program Participation	Includes requests, consent / permission forms, correspondence and reports regarding school field trips and reports relating to the student(s) involved in student exchanges. Note: If any incident occurs on field trip consent / permission forms are filed with accident reports	Schools	E + 1 year	E = Student's 18th birthday	Archival Review	OSR		PIB Operational value
STU-ENR-007	Student Services	Student Admission / Registration / Enrolment	Student Records: Special Program	Includes records of individual students who are referred for placement in special program classes, such as applications for admission, tests, assessments and raw data (e.g., IEP).	Schools	E + 5 years	E = Retirement of Student	N/A	OSR		PIB OSR Operational Value
STU-ENR-008	Student Services	Student Admission / Registration / Enrolment	Student Registration and Verification Forms	Registration forms, data verification forms, applications for school entry or special programs such as French Immersion. Also may include "Release Form for use of student personal information." Excludes: Pupil Eligibility Attestation Form	Schools	CY + 2 years	CY = Current Year	Destroy	OSR	Ont. 1, Ont. 2, Ont. 4, Ont. 64, Ont. 114, Ont. 225	PIB Subject to Ministry of Education Audit http://www.edu.gov.on.ca/eng/policyfunding/forms.html%23ec EA-O Instructions for the Use of Computerized Enrolment Registers for Elementary and Secondary Schools MEIPPA-O
STU-ENR-009	Student Services	Student Admission / Registration / Enrolment	Student Reports	Includes all report listings concerning individual students that are retrievable by student name or other personal identifier such as first language reports, feepaying / out-of-country students, class list reports, tape dumps, office index card listings, Student On-line Transaction Listings, and Student Information System edits. Also includes home room listings, and parental emergency contact lists. Excludes: Summary reports Not organized by name	Schools	S/O	S/O = Superseded or Obsolete	Destroy			Reference purpose only - shred once use is complete.

CODE	Function	Activity	Record Series	Description	Accountability	Total Retention	Trigger	Disposition	Inclusion in OSR	Citations	Comments
STU-SUP-001	Student Services	Student Support and Wellness	Attendance Counselling	Records for students who are referred for counselling on attendance problems. Includes referral, consents, meeting notes, and letters. Also includes Supervised Alternative Learning (SAL) records.	Attendance Counsellor / Social Worker / Student Services / Learning Services	E + 10 years	E = Student's 18th birthday	Destroy	OSR	Ont. 1, Ont. 2, Ont. 4	PIB SEE ALSO SOCIAL WORK RECORDS IN LASERFICHE MFIPPA-O EA-O
STU-SUP-002	Student Services	Student Support and Wellness	Career Counselling / Guidance Services	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.	Schools	CY + 1 year	CY = Current Year	Destroy		Ont. 1, Ont. 2, Ont. 4	PIB EA-O Creating Pathways for Success Ministry Document
STU-SUP-003	Student Services	Student Support and Wellness	Child 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. Includes correspondence and confidential reports regarding students where there is suspicion of child abuse, neglect or family violence. See Also Psychological Student Assessments.	Schools	CY + 55 years	CY = Current Year	Destroy		Ont. 1, Ont. 2, Ont. 4, Ont. 228 https://cpo.on.ca/resources/reference-library/ , esp: https://cpo.on.ca/wp-content/uploads/Standards-of-Professional-Conduct-2017-Practical-Applications-Current-to-March-19-2021.pdf s. 9	PIB Operational Value
STU-SUP-004	Student Services	Student Support and Wellness	Guidance Materials	Includes brochures, calendars, description sheets, and catalogues relating to career opportunities, external school programs, post-secondary education, private schools, and scholarships to support students.	Schools	S/O	S/O = last updated	Destroy			Operational value
STU-SUP-005	Student Services	Student Support and Wellness	Medical Home Instruction	Home instruction is a short-term intervention for students who are unable to attend school for medical or behavioural reasons. Excludes timesheets for teachers. See Also Home Schooling	Schools	E + 1 year	E = Current year of home instruction period	Destroy		Ont. 1, Ont. 2, Ont. 4,	PIB

CODE	Function	Activity	Record Series	Description	Accountability	Total Retention	Trigger	Disposition	Inclusion in OSR	Citations	Comments
STU-SUP-006	Student Services	Student Support and Wellness	Social Work Services	Includes records of individual students who are referred for social worker services, such as referral forms, statistical forms, confidential notes from interviews and correspondence with third parties. Also includes F&CS 1 Form (F&CS = Family and Children's Services).	Learning Services	E + 10 years	E = Retirement of student or, after 18th birthday OR If the client was less than 18 years at the time of their last relevant clinical contact, 10 years following the day the client became or would be 18 years of age.	Destroy	OSR	Ont. 1, Ont. 2, Ont. 4, Ont. 128	PIB MFIPPA-O EA-O
STU-SUP-007	Student Services	Student Support and Wellness	Student Portfolio Individual Pathways Plan (IPP)	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. Housed in a program entitled "My Blueprint" .	Schools Electronic 7-12	E + 5 years	E = Retirement from school	Destroy		Ont. 1, Ont. 2, Ont. 4, Ont. 41, Ont. 55	PIB EA-O Creating Pathways for Success Ministry Document
STU-SUP-008	Student Services	Student Support and Wellness	Student Portfolio K - Gr. 6	The "All About Me" portfolio contains evidence of a student's learning in education and career / life planning (e.g., materials, information, and personal reflections). It is compiled by the student, with the support of the teacher, in a format that is appropriate to the age of the student and that is transferable from grade to grade. Also becomes accessible through "My Blueprint" See Also Student Portfolio Individual Pathways Plan (IPP)	Schools	S/O	S/O = Superseded or Obsolete	N/A	OSR		PIB Transferable from grade to grade. EA-O Creating Pathways for Success Ministry Document"

CODE	Function	Activity	Record Series	Description	Accountability	Total Retention	Trigger	Disposition	Inclusion in OSR	Citations	Comments
STU-ASP-001	Student Services	Student Assessment and Progress	Examinations and Testing	Records include correspondence, exam day attendance and originals of completed student examinations, and master copies of blank exams. Excludes province-wide testing (e.g. EQAO)	Schools	CY + 1 year	CY = Current Year	Destroy		Ont. 1, Ont. 2, Ont. 4	PIB Student Report sent home to parents/guardian Additional copies available through EQAO if required. MFIPPA-O
STU-ASP-002	Student Services	Student Assessment and Progress	Individual Education Plans (IEP)	An IEP is a written plan (hard copy and / or electronic) describing the special education program and/or services required by a 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.	Schools	S/O + 1 year	S/O = Superseded or Obsolete	Destroy	OSR	Ont. 1, Ont. 2, Ont. 4, Ont. 53	PIB IEPs are managed from within enCompass System Reviewed annually Supersede previous IEP EA-O
STU-ASP-003	Student Services	Student Assessment and Progress	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.	Schools	CY + 6 years	CY = Current Year	Destroy	OSR	Ont. 1, Ont. 2, Ont. 4, Ont. 41	PIB OSR MFIPPA-O MCIIT
STU-ASP-004	Student Services	Student Assessment and Progress	Psychological Services Records	Includes professional records and information relating to individual students who are referred for psychological assessments, such as consultation and clinical notes, testing protocols, consent forms, referral forms, correspondence. May include third party reports.	Student (Special Education) Services	E + 10 years	E = Retirement of student plus 10 years after 18th birthday	Destroy		Ont. 1, Ont. 2, Ont. 3, Ont. 4	PIB OSR MFIPPA-O Standards of Professional Conduct - Psychologists and Health Professionals
STU-ASP-005	Student Services	Student Assessment and Progress	Specialized Equipment Needs - Student	Includes records for student requiring special equipment to assist in the instruction of the student.	Special Education / Schools	E + 5 years	E = Retirement of Student	Destroy		Ont. 1, Ont. 2, Ont. 4	PIB

CODE	Function	Activity	Record Series	Description	Accountability	Total Retention	Trigger	Disposition	Inclusion in OSR	Citations	Comments
STU-ASP-006	Student Services	Student Assessment and Progress	Speech and Language Student Services	Includes records of individual students who are referred to language / speech services, such as assessments, referral forms, test results, recommendations and programming suggestions.	Special Services / Schools	E + 10 years	E = Retirement of Student	Destroy		Ont. 1, Ont. 2, Ont. 3, Ont. 4, Ont. 330	PIB OSR EA-O Standards of Professional Conduct - Psychologists and Health Professionals
STU-ASP-007	Student Services	Student Assessment and Progress	Student Health	Includes medical and health information regarding students required for the care and treatment of students in the school setting. Includes pediculosis, medical emergency plans, administration of medication plans, and other health related materials.	Schools	S/O	S/O = Superseded or Obsolete	Destroy		Ont. 1, Ont. 2, Ont. 3, Ont. 4	PIB Updated every school year
STU-REC-001	Student Services	Student Records Administration	Community Service Hours	Document to support the completion of the required secondary school community service hours completed by students.	Schools	E + 5 years	E = Retirement of student	Destroy		Ont. 1, Ont. 2, Ont. 4	PIB OSR EA-O
STU-REC-002	Student Services	Student Records Administration	Continuing Education Student 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).	Schools	E + 55 years	E = Retirement of student	Destroy	OSR	Ont. 1, Ont. 2, Ont. 4, Ont. 42	PIB OSR MFIPPA-O
STU-REC-003	Student Services	Student Records Administration	Co-operative Education 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. See OYAP Participant Application Form for apprenticeship co-op placements	Schools	E + 5 years	E = Retirement of student	Destroy		Ont. 1, Ont. 2, Ont. 4, Ont. 41	PIB OSR MFIPPA-O
STU-REC-004	Student Services	Student Records Administration	Experiential Learning Student Records	Includes records of individual students participating in experiential learning work assignments, such as introduction cards, work portfolio, and evaluation forms for employer interviews, training plans and application for programs, student evaluation forms, monitoring report. Includes SHSM Program records. Excludes: Experiential Learning Programs, Work Education Agreements. See Accident / Incident Claims & Report for work-related injury or disease during community component of course.	Schools	CY + 1 year	CY = Current Year	Destroy		Ont. 1, Ont. 2, Ont. 41	PIB

CODE	Function	Activity	Record Series	Description	Accountability	Total Retention	Trigger	Disposition	Inclusion in OSR	Citations	Comments
STU-REC-005	Student Services	Student Records Administration	Home Schooling	Signed form indicating a student will be withdrawn to be home-schooled. Would include any follow up communication. See Also Medical Home instruction	School	CY + 2 years	CY = Current Year	Destroy		Ont. 1, Ont. 2, Ont. 4	PIB Subject to Ministry of Education Audit http://www.edu.gov.on.ca/eng/policyfunding/forms.html%23ec
STU-REC-006	Student Services	Student Records Administration	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. The OIC may be retained electronically if a hard copy can be readily produced; may be retained with OSR - Inactive. See Also: OSR - Inactive	Schools	E + 55 years	E = Retirement of Student	Destroy	OSR		PIB Office Index Card may be retained in both the OSR - Inactive (E + 55) and electronically; the core issue is that it is readily accessible and part of the inactive record.
STU-REC-007	Student Services	Student Records Administration	Ontario Student Record (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 See Also: Ontario Student Record - Inactive for OSR Components Requiring 55-Year Post-Retirement Retention	Schools	E + 5 years	E = Retirement of Student	Destroy		Ont. 1, Ont. 2, Ont. 4	PIB
STU-REC-008	Student Services	Student Records Administration	Ontario Student Record (OSR) - Inactive	Transcript or elementary final student report card and elementary record of instruction in French/Indigenous as a second language, if applicable. Inactive records are retained in accordance with board processes. May include Office Index Card. See Also: Office Index Card; Ontario Student Record (OSR) - Active	Schools / Student Information System	E + 55 years	E = Retirement of student	Destroy	OSR	Ont. 1, Ont. 2, Ont. 4	PIB

CODE	Function	Activity	Record Series	Description	Accountability	Total Retention	Trigger	Disposition	Inclusion in OSR	Citations	Comments
STU-REC-009	Student Services	Student Records Administration	OSR Release Checklist & Intake Summary Elementary	Release and intake checklist for transferring Ontario Student Records between schools.	School	Transitory	N/A	Destroy			Once OSR is confirmed received at receiving school.
STU-REC-010	Student Services	Student Records Administration	OSR Release Checklist & Intake Summary Secondary	Release and intake checklist for transferring Ontario Student Records between schools.	School	Transitory	N/A	Destroy			
STU-REC-011	Student Services	Student Records Administration	OSR Sign-Out forms	Forms used to track the sign out and sign in of OSRs in schools. Supports audit activities and OSR maintenance requirements.	Schools	CY + 2 years	CY = Current Year	Destroy		Retain for Audit purposes	
STU-REC-012	Student Services	Student Records Administration	OSR Transfer Requests	Requests received from other schools or school boards for Ontario Student Record.	Schools	CY + 2 years	CY = Current Year	Destroy		Ont. 1, Ont. 2, Ont. 4,	PIB Subject to Ministry of Education Audit http://www.edu.gov.on.ca/eng/policyfundin g/forms.html%23ec
STU-REC-013	Student Services	Student Records Administration	OYAP Participant Application Form	Form for co-op students whose placement is within an apprenticeship trade. Includes forms for access to the Ministry's SP-Connect system for board users for OYAP. See Programs: Co-operative Education for broader Co-operative placement program documentation	Program Services	E + 7 years	E = Retirement from the school	Destroy		Ont. 1, Ont. 2, Ont. 4, Ont. 41	PIB
STU-REC-014	Student Services	Student Records Administration	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. Includes information on students' courses completed, marks received and mark verification sheets. Also includes electronic records. Excludes report cards.	School	E + 5 years	E = Retirement of student	Destroy	OSR	Ont. 1, Ont. 2, Ont. 4, Ont. 41	PIB OSR Student marks are included in OSR as part of the report card. EA-O Operational Value SEE ONTARIO CURRICULUM - COOPERATIVE EDUCATION Grades 11 and 12, 2018

CODE	Function	Activity	Record Series	Description	Accountability	Total Retention	Trigger	Disposition	Inclusion in OSR	Citations	Comments
STU-REC-015	Student Services	Student Records Administration	Supervised Alternative Learning (SAL) Records	Includes records of individual students who make application to a SAL program.	Student Services / School	E + 5 years	E = Retirement of student	Destroy		Ont. 1, Ont. 2, Ont. 4, Ont. 41	PIB
STU-REC-016	Student Services	Student Records Administration	Timetable - Student	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.	School	CY + 2 years	CY = Current Year	Destroy		Ont. 1, Ont. 2,	PIB Subject to Ministry of Education Audit http://www.edu.gov.on.ca/eng/policyfunding/forms.html%23ec
STU-DIS-001	Student Services	Student Discipline	Expulsions	Safe School Incident Reporting Form Part 1, related documentation, and any correspondence, if relevant to the expulsion of a student. Filed in the OSR.	School	CY + 1 year E + 5 years if expulsion is a result of a violent incident	CY = Current Year E = Date of Expulsion report	Destroy	OSR	Ont. 1, Ont. 2, Ont. 4, Ont. 227, PPM 120	PIB
STU-DIS-002	Student Services	Student Discipline	Incidents Not Resulting in a Suspension or Expulsion	Safe School Incident Reporting Form Part 1, related documentation, and any correspondence. Filed in the OSR.	Schools	E + 1 year if a violent incident	E = Date of incident report	Destroy	OSR	PPM 120 If not a violent incident, no retention required at principal's discretion.	PIB OSR
STU-DIS-003	Student Services	Student Discipline	Suspensions - Non-Violent Incident	Safe School Incident Reporting Form Part 1, related documentation, and any correspondence, if relevant to the suspension of a student. Filed in the OSR. See: Suspension - Violent Incident for Suspensions due to Violent incidents.	Schools	E + 1 year	E = Date of suspension report	Destroy	OSR	Ont. 1, Ont. 2, Ont. 4, PPM 120	PIB OSR
STU-DIS-004	Student Services	Student Discipline	Suspensions - Violent Incident	Safe School Incident Reporting Form Part 1, related documentation, and any correspondence, if relevant to the suspension of a student. Filed in the OSR. See: Suspensions due to Non-Violent incidents for suspensions not related to violent incidents.	Schools	E + 3 years	E = Date of suspension report	Destroy	OSR	Ont. 1, Ont. 2, Ont. 4, PPM 120	PIB OSR

CODE	Function	Activity	Record Series	Description	Accountability	Total Retention	Trigger	Disposition	Inclusion in OSR	Citations	Comments
STU-DIS-005	Student Services	Student Discipline	Threat Assessment Process Documentation	Includes Follow-up Intervention Plan (filed with safe schools department or Board equivalent), Case Conference Form. Filed in the OSR. See Also: Threat Risk Assessment (Stage 1), Threat Risk Assessment (Stage 2)	Schools / Safe Schools Department or Board Equivalent	CY + 1 year	CY = Current Year	Destroy	OSR		PIB May be retained longer at principal's discretion.
STU-DIS-006	Student Services	Student Discipline	Threat Risk Assessment (Stage 1)	Stage 1 Threat Risk Assessment Forms See Also: Threat Risk Assessment Process Documentation, Threat Risk Assessment (Stage 2).	Learning Services	E + 5 years	E = Retirement of student	Destroy	OSR	Ont. 1, Ont. 2, Ont. 4	PIB Operational value
STU-DIS-007	Student Services	Student Discipline	Threat Risk Assessment (Stage 2)	Threat Risk Assessment Summary Form (Stage 2). Filed in OSR. See Also: Threat Risk Assessment Process Documentation, Threat Risk Assessment (Stage 1).	Schools	E + 10 years	E = Retirement of student	Destroy	OSR		PIB OSR Operational value
STU-ACT-001	Student Services	Student Activities and Programs	Adult Volunteer Programs	Information and records of volunteer programs involving members external to the school community. e.g. Parents. Includes Annual Receptions, After School Programs, Child Video Identification Program - Recruitment Workshops, Volunteer Activities in Schools, Volunteer's Signed Application Form, and Volunteers Assisting Teachers (VAT).	Schools or Site	S/O + 1 year	S/O = Superseded or Obsolete	Destroy		Ont. 1, Ont. 2, Ont. 4	PIB OSR Operational value
STU-ACT-002	Student Services	Student Activities and Programs	Extended Day Program	Current year information which includes 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. Includes any record, report, or other document specified by regulation. Includes records of discharged or withdrawn children.	Schools	CY + 3 years	CY = Current Year	Destroy			PIB
STU-ACT-003	Student Services	Student Activities and Programs	Extracurricular / Co-curricular Activities	Records and information that pertain to student activities that are part of school life such as field trips, school dances, extra-curricular activities, student exchanges, competition, related correspondence, plans, schedules. Includes e.g., requests, consent forms, school field trips, concerts, festivals, track meets, tournaments, facility tours, art or essay contests, and science fairs.	Schools	CY + 1 year	CY = Current Year	Destroy		Ont. 1, Ont. 2, Ont. 4	PIB Operational value
STU-ACT-004	Student Services	Student Activities and Programs	Nutrition	Records relating to nutrition including milk programs, breakfast programs, and litter less lunch programs, etc.	Schools	CY + 1 year	CY = Current Year	Destroy			Operational Value

CODE	Function	Activity	Record Series	Description	Accountability	Total Retention	Trigger	Disposition	Inclusion in OSR	Citations	Comments
STU-ACT-005	Student Services	Student Activities and Programs	Scholarships, Bursaries, and Awards - Non-Monetary	Records 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. See Also: Financial Management: Scholarship Funds, Bequests & Donations	Secondary Schools School	CY + 1 year	CY = Current Year	Archival Review		Ont. 1, Ont. 2, Ont. 4	PIB OSR Operational value
STU-ACT-006	Student Services	Student Activities and Programs	School Course Calendars	Includes outlines of available programs and courses of study. Includes elementary course timetables, secondary school course calendars, yard duty schedules, school year calendars, school bell schedules, and related records. Also includes timetables and "teacher day books" maintained by teachers. Excludes: student timetables, course selection sheets, individual student exams and exam schedules. See Also: Timetable - Student	Schools	CY + 2 years	CY = Current Year	Archival Review Subject to Ministry of Education Audit http://www.edu.gov.on.ca/eng/policy/funding/forms.html%23ec		Ont. 1, Ont. 2, Ont. 4	PIB
STU-ACT-007	Student Services	Student Activities and Programs	Student Exchanges	Includes correspondence, plans, schedules, and reports relating to the student(s) involved in the exchange. Includes records regarding student exchanges.	Schools	CY + 1 year	CY = Current Year	Destroy		Ont. 1, Ont. 2, Ont. 4	PIB OSR Operational value
STU-ACT-008	Student Services	Student Activities and Programs	Transportation: Student Bus Services	Includes school-based records concerning transportation / busing for transportation of students to and from schools, Special Education, field trips, and special programs. Records include bus schedules, requests for transportation, bus routes, boundaries, and student lists (names and addresses).	Schools	CY + 1 year	CY = Current Year	Destroy		Ont. 1, Ont. 2, Ont. 4	PIB Operational value