

**PEMBINA TRAILS SCHOOL DIVISION**  
**RECORDS RETENTION AND DISPOSITION SCHEDULE**

**EHB-E-1**

Item	Description of Record	Minimum Retention	Disposition
<b>1. SCHOOL BOARD RECORDS</b>			
1.1	Board and Committee of the Whole Meeting Agendas and all supporting material.	20 years	ARCHIVE
1.2	By-Laws	20 years	ARCHIVE
1.3	Legal Opinions	7 years	DESTROY
1.4	Disclosure of assets and interests	Until superseded	DESTROY
1.5	Oath of Office for Trustee	Expiration of Term	DESTROY
1.6	Trustee Working Files – includes working papers, notes, correspondence, and other documents related to school board matters	Expiration of Term	DESTROY
1.7	Handwritten notes/recordings of board meeting proceedings	4 Months after approval of minutes	DESTROY
<b>2. SCHOOL DIVISION RECORDS</b>			
<b>2A. Administration</b>			
2A.1	<b>Administrative Policies, Procedures and Guidelines</b> (including manuals)	Until superseded	DESTROY
2A.2	<b>Archives/Records Management</b>		
(i)	Records disposition documentation (logs of on-site records disposition)	10 Years	DESTROY
(ii)	Inventory of non-current or inactive records in storage	Until superseded	DESTROY
(iii)	Records transfer list for archival records	Ongoing	Maintained indefinitely at Division level.
(iv)	Records on use of archival materials – log or register of researchers	5 years	DESTROY
2A.3	<b>Board of Reference Awards</b> Copies are stored permanently in the Manitoba Education School division/district formation files	20 years	DESTROY
2A.4	<b>Administrative Files</b> including correspondence, memos, reports, and other documents created or received by the school division, except for records which are listed elsewhere on this schedule		
(i)	Preliminary working papers and draft documents, whether handwritten or electronic	Until superseded	DESTROY
(ii)	General administrative and operational records of no continuing fiscal, legal or administrative value	1 year	DESTROY
(iii)	Significant policy or decision-making records of fiscal, legal, administrative or historical value	7 years	ARCHIVE
2A.5	<b>Electronic Systems Documents</b> – Records necessary for retrieval of information retained in machine readable format, including use guide; internal memoranda; system or system definition, flowchart	Until superseded	DESTROY

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	or outline; list of index or programs and codes; detailed program description and documentation; job control or work flow records; system specifications; file specifications; input and output specifications and test data		
2A.6	<b>School Division Administrative Reports</b> – Planning and implementation reports as required by Manitoba Education or for school division initiated programs	5 years	DESTROY
2A.7	<b>School Administrative Reports</b>	5 years	DESTROY
2A.8	<b>Curriculum Documents</b>	Until superseded	DESTROY
2A.9	<b>Grant Records</b>		
(i)	Supporting documentation and reports for any funding grants, including the provincial support program	7 years	DESTROY
(ii)	Supporting documentation for grant applications that have been rejected.	1 year	DESTROY
2A.10	<b>Insurance records</b>		
(i)	Policies	Term plus 1 Year	DESTROY
(ii)	Employee injury claims, including Workers Compensation Board claims. Note: These are included in the employee file	10 Years after termination (as per employee file)	DESTROY
(iii)	All other insurance claims	7 years	DESTROY
(iv)	Reports of theft, arson, vandalism, property damage or similar occurrences	7 years	DESTROY
2A.11	<b>Accident Reports</b> , i.e. students, staff and vehicles (but not including school buses)	7 years	DESTROY
2A.12	<b>Litigation Records</b>		
(i)	Routine	7 years after settlement, judgment, discontinuance or dismissal or 7 years after any minor involved attains age of majority	DESTROY
(ii)	Significant, i.e. precedent setting	7 years	ARCHIVE
2A.13	<b>Safety Records</b> – fire, health, boiler, playgrounds, etc., including inspection reports	3 Years or until superseded	DESTROY
2A.14	<b>Workplace, Safety &amp; Health Records</b>		
(i)	WHMIS	Until materials are no longer in possession	DESTROY
(ii)	All other records, including training materials	As per legislative requirements	DESTROY
<b>2B Financial Management Records</b>			
2B.1	<b>Accounts Payable/Receivable</b> including requisitions, purchase orders, invoices, receipts and other source documents	7 years	DESTROY
(i)	System Batch Reports	1 year	DESTROY

Item	Description of Record	Minimum Retention	Disposition
2B.2	<b>Bank statements , cancelled cheques, deposit books, transfer confirmations</b>	7 years	DESTROY
2B.3	<b>Financial Source Documents</b> , i.e. journal entries, deposit listings, financial reports, working papers	7 years	DESTROY
2B.4	<b>Ledgers</b>		
(i)	General	10 years	DESTROY
(ii)	Subledgers	10 years	DESTROY
2B.5	<b>Budgets</b>		
(i)	Approved Annual	15 years	DESTROY
(ii)	Final Working Papers	7 years	DESTROY
2B.6	<b>Financial Statements/Reports</b>		
(i)	Monthly	7 years	DESTROY
(ii)	Annual Statement	10 years	ARCHIVE
(iii)	Annual Report of the Auditor	10 years	ARCHIVE
(iv)	Final Working Papers	7 years	DESTROY
2B.7	<b>Investment Records</b>	Term plus 1 year	DESTROY
2B.8	<b>Agreements</b> i.e., purchasing/leasing, service and maintenance	Term plus 1 year	DESTROY
2B.9	<b>Loans and Cancelled Notes</b>	Term plus 1 year	DESTROY
2B.10	<b>Tenders and Quotes</b>	5 years or until re-tendered	DESTROY
<b>2C Human Resources and Payroll Files</b>			
2C.1	<b>Payroll Administration Documents</b>		
(i)	Payroll Deductions including garnishments, assignments, attachments of employee salaries	10 Years after employment is terminated	DESTROY
(ii)	Leaves – Records of employee requests for and/or authorizations for sick, vacation, personal or other leave.		
(iii)	Payroll source documents, e.g. time sheets	7 years	DESTROY
(iv)	T-4's, T-4A's		
(v)	TD-1's		
(vi)	Bank Transfer Reports /Net Voucher Listings	2 years	DESTROY
2C.2	<b>Payroll Registers</b>	55 years	DESTROY
2C.3	<b>Employee Files</b> (includes application forms, contracts, evaluation forms, deduction documents, etc.) Note: The employee's payroll file and HR file are combined into one employee file at termination.	10 years after termination	DESTROY
2C.4	<b>Personnel Administration</b> (includes policy and procedures records, policy manual)	2 years or until superseded	DESTROY
2C.5	<b>Collective Agreements</b>	10 years after expiration	ARCHIVE
2C.6	<b>Grievance Records</b>	10 years after final decision	DESTROY
2C.7	<b>Applications for Employment, Competition and Hiring Records</b>		
(i)	Solicited – includes applications of unsuccessful candidates, competition records and other supporting documents	2 years	DESTROY

Item	Description of Record	Minimum Retention	Disposition
(ii)	Unsolicited	1 year	DESTROY
2C.8	<b>Substitute Teacher Applications and Contracts</b>	7 years	DESTROY
<b>2D Buildings &amp; Properties</b>			
2D.1	<b>Capital Construction File</b> , including but not limited to bids, construction agreements, tender documents, specifications, contracts, performance guarantees, inspection reports, and environmental impact statements	Life of building plus 1 year	DESTROY
2D.2	<b>Certificate of Title</b>	While applicable	Surrender as requested
2D.3	<b>Engineering Reports</b>	While applicable	DESTROY
2D.4	<b>Maintenance, repair, equipment</b> installation records, including but not limited to request for service, work order, record of work done, and summary or log of service performed	3 years	DESTROY
2D.5	<b>Plans, maps, designs and surveys for buildings</b> or other facilities owned by the Division	Life of building/facility plus 1 year	DESTROY
2D.6	<b>Photographs</b>	Life of building/facility plus 1 year.	ARCHIVE
2D.7	<b>Property Inventory</b> covering vehicles, machinery and equipment	6 years after replacement, sale, or discontinuance of use of all property listed.	DESTROY
<b>2E Transportation</b>			
2E.1	<b>Pupil Transportation System Reports</b>		
(I)	Manitoba Education System Reviews	Until superseded	DESTROY
(II)	School Division Self-Evaluation Reviews	10 years	DESTROY
2E.2	<b>School Bus Fleet Records</b>		
(i)	School bus accident reports	1 year after disposition of bus or expiry of agreement	DESTROY
(ii)	School bus purchases and disposal records		
(iii)	School bus lease agreements		
(iv)	Contract school bus service agreements		
2E.3	<b>Ridership training and school bus evacuation records</b>	2 years	DESTROY
2E.4	<b>School bus ridership list or pupil transportation eligibility record for common carriers and contract buses</b> , including names of students for each route		
2E.5	<b>School Bus route schedule or diagram</b> , including location and times of stops		
2E.6	<b>Transportation report</b> – providing information for each trip, by each bus		
2E.7	<b>Vehicle inspection, repair and maintenance record</b> , including gasoline and oil consumption	1 year after disposition of bus	DESTROY
2E.8	<b>Routine Video/Audio Recordings</b>	2 years	DESTROY

Item	Description of Record	Minimum Retention	Disposition
<b>3 School Administration Records</b>			
3.1	<b>Administration Files</b> , including correspondence, memos, reports, and other documents created or received by the school (except for records which are listed elsewhere on this schedule)	1 year	DESTROY
3.2	<b>Crisis Response/Emergency Plan</b>	3 years after superseded	DESTROY
3.3	<b>Inventory</b> , of supplies, equipment, textbooks, etc.	Until superseded	DESTROY
3.4	<b>Minutes</b> , i.e. staff, department, administrative, workplace safety and health. May also include copies of advisory/parent council and student council meetings	3 years	DESTROY
3.5	<b>School Fund Accounts and Records</b> (including all financial records)	7 years	DESTROY
3.6	<b>School Administrative Reports</b> , e.g. annual reports of the principal on enrolments, staffing, curriculum, facilities, school plan, etc.	5 years	DESTROY
3.7	<b>School policies/regulations</b>	Until superseded	DESTROY
3.8	<b>Master timetable</b> , noting courses offered, teacher course allocations, enrolments	5 years	DESTROY
3.9	<b>School Curriculum</b>		
(i)	School Initiated Courses	3 years	DESTROY
(ii)	Student Initiated Projects		
(iii)	Course Catalogues	5 years	
3.10	<b>Course Records</b>		
(i)	Teachers' grade records, test scores and marking sheets	2 years	DESTROY
(ii)	Examination paper, master copy		
(iii)	Examination answer papers	½ year after course completion	DESTROY
3.11	<b>Locally Marked Provincial Standards Tests</b>		
(I)	Exam Administration Records	5 years	DESTROY
(II)	Student Answer Sheets and Exam Booklets		
(III)	Scoring Documentation		
(iv)	Manitoba Education Report, including Needs Assessment Survey and Audit Report		

Note: School Yearbooks should be held in school/school division libraries.

<b>4 STUDENT RECORDS</b>			
4.1	<b>Academic Records – Grades 9 - 12</b> (Student Marks)	30 years	DESTROY
4.2	<b>Enrolment files</b> , which include:		
(i)	Daily attendance	10 years (registers up to 1967 to be transferred to Archives)	DESTROY

(ii)	Annual enrolment (September)	7 years (registers up to 1967 to be transferred to Archives)	DESTROY
(iii)	Monthly enrolment reports (See note)		
4.3	<p><b>Pupil Files</b>  (Refer to the <i>Manitoba Pupil File Guidelines</i> for further information.)  <u>Note:</u> School principals are required to forward a pupil's pupil file when the pupil transfers to another school</p>		
(i)	Cumulative file component  (Transferable – Refer to the <i>Manitoba Pupil File Guidelines</i> for further information.)	10 years after student ceases to attend a school operated by the Board <b>if</b> the pupil file has not been transferred to another school.	DESTROY
(ii)	Student Services file component maintained at the school by Clinicians.  (Transferable – Refer to the <i>Manitoba Pupil File Guidelines</i> for further information)		
(iii)	Clinical Services Records which are maintained at the Administration Office.		
(iv)	Youth Criminal Justice file component  (Not transferable – Refer to the <i>Manitoba Pupil File Guidelines</i> for further information.)	Retained until information is no longer required for the purpose for which it was established or until student transfers out of the school	DESTROY (immediately)

**NOTE: Monthly enrolment reports are retained at Admin Office. They are included in board agenda/minute packages which are archived.**