

## **Records Management**

### **Background**

The organization, handling, storage, scheduling and disposal of records must be performed in a standard and consistent manner. It is essential that the proper retention periods be maintained to meet all legal, financial, and historical requirements.

### **Definitions:**

Record means information in any recorded form. This includes: documents, letters, hand-written notes, papers, draft documents, e-mail, voice mail, computer data files, books, vouchers, maps, drawings, photographs, student records and calendars in the custody or control of the District. All records created by staff are the property of the District.

Student records are specifically subject to the Student Record Regulation under the School Act and Regulations and are also addressed in Administrative Procedure 320 – Student Records.

Personal Information means any information about an identifiable individual, including:

- Name, home address or telephone number;
- Race, national or ethnic origin, colour, religion, political beliefs or associations;
- Age, sex, marital status, family status;
- Identifying numbers;
- Fingerprints or blood type;
- Health and health care history;
- Educational, financial, employment, criminal records.

Transitory Records are records that are not required to meet statutory obligations or to sustain administrative or operational functions. These records are still to be handled as “Confidential Information”.

Transitory Records are records in any media that:

- Have only temporary usefulness;
- Are not part of an administrative or operational records series;
- Are not regularly filed in a records information system; and
- Are required only for a limited period of time for the completion of a routine action or the preparation of a record.

### **Procedures**

1. Records required for statutory, legal, fiscal, administrative or operational purposes must be retained in a regular records or information system and disposed of separately in accordance with an established retention schedule.

## 2. Storage of Records

- 2.1 Each facility will maintain a secure area to keep the physical records they must retain;
- 2.2 At the end of each school year, current records will be either destroyed (if transitory) or archived for retention;
- 2.3 Archived records will normally be stored in individual facilities unless arrangements are made to transfer the archives to either the Service Centre or District Office;
- 2.4 Archived records will be stored in a manner that will facilitate easy retrieval and disposal in the future. The Record Series number, description of records, year of the record and the disposal date must be clearly marked on the container or location where the archived records are stored. The responsibility to identify the records prior to archival and storage rest with the School Principal or the Site Administrator.
- 2.5 Prior to any transfer or archival records, the list of records transferred must be prepared and provided to the Secretary-Treasurer or designate;

## 3. Retrieval of Records from Storage

- 3.1 Access to records stored in archival storage areas is restricted to designated employees;
- 3.2 Records can be obtained from the storage area upon request from the Site Manager or designate;
- 3.3 Records must be returned to the same files, boxes or containers. If records are removed and/or re-boxed the Site Manager must be notified.

## 4. Disposal of Records

- 4.1 Disposal of records can only take place according to the parameters set in the retention schedule;
- 4.2 All destruction of records must be documented and approved by the Secretary-Treasurer or designate using the Certificate of Destruction of Record Form (185-1);
- 4.3 Disposal of records must be conducted in a manner that ensures no information from the records might inadvertently be released;
- 4.4 Non-Record/Transitory Records are considered confidential waste. The same security arrangements are to be taken for their disposal.

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**Approval Date:** June 30, 2017

**Reference:** Section 23, 60, 61, 75, 113 School Act  
Freedom of Information and Protection of Privacy Act FOIP Regulation 200/95  
Student Record Regulation 225/2006  
Information Bulletin 3.2.5 – Access to Information  
Information Bulletin 3.2.7 – Student Record Regulation Information