

AP 670-1 Schedule of Retention Periods



DEFINITION:

Record: A record includes books, documents, maps, drawings, photographs, letters, vouchers, papers, and any other things on which information is recorded or stored by graphic, electronic, mechanical, or other means but does not include a computer program or any other mechanism that produces records.

BOARD	
RECORDS	RETENTION PERIOD
Annual Reports	Permanent
Board Policy	Permanent
Committee reports	Permanent
Board Minutes	Permanent
Notice of Meetings and agendas	5 years
Oaths and Declaration of Trustees	For term of office
FINANCIAL	
RECORDS	RETENTION PERIOD
Accounts payable and receivable	6 years
Annual budget and supporting documents	Permanent
Auditor's reports	Permanent
Cancelled cheques	6 years
Cheque duplicates	2 years
Debenture and bylaw register	Permanent
Debenture and coupons redeemed (board approval required prior to destruction)	3 years after audit
Purchase orders and invoices	7 years
Ledgers, subsidiary ledgers, and journals	Permanent
Receipts issued	6 years
Scholarships and bursaries	7 years
Quotations and related correspondence	1 year
Financial and statistical statements	Permanent
BANKING	
RECORDS	RETENTION PERIOD
Bank statements	6 years
Deposit books	6 years
Loans – authorization of	1 year or term of loan
Cancelled notes	6 years
Stop orders	1 year
FACILITIES	
RECORDS	RETENTION PERIOD
Appraisal and inventory records	Permanent
Facility rental records	1 year after year of rental
Authorization for expenditure of capital funds	Permanent
Building plans and specification changes (guarantees, bonds, liens, and correspondence)	Permanent
Land titles, deeds, and plans	Permanent
Mortgages and leases	1 years after expiration of term

Inspection Reports (SPP, WCB, Fire Commission)	6 years after year of asset disposal
Reports (Consultants, Engineers, etc.)	6 years after year of asset disposal
GENERAL ADMINISTRATION (District Office)	
RECORDS	RETENTION PERIOD
Administrative Procedures	While in effect
Freedom of Information Requests	3 years
Requests to Review Freedom of Information Decisions	5 years after review or adjudication is complete
Insurance – accident reports	1 year or until finalized
Insurance - claims	Permanent
Insurance – policies	While in effect
General Correspondence (not departmental)	2 years
Transportation data	While applicable
HUMAN RESOURCES	
RECORDS	RETENTION PERIOD
WorkSafe BC claims	Permanent
Applications, resumes, evidence of qualifications (transcripts, certificates, reference checks, etc.)	Permanent if employed or 6 months if not employed
Collective Agreements with Unions	Permanent
Personnel file (All records and data relating to any employee - applications, appointments, personal services contracts, TD1, etc.)	Permanent
Employee investigations / grievances	Permanent or as per CA
Letters of discipline	Personnel File. Per applicable CA.
Seniority Lists	Permanent
Unsolicited resumes	6 months
PAYROLL	
RECORDS	RETENTION PERIOD
Payroll Reports	6 years after year of creation
Payroll remittances (garnishees, pension, EI)	3 years
Timesheets	6 years after year of creation
Employee benefit applications, waivers, and changes	Permanent
Payroll deduction authorizations	Permanent
SCHOOL	
RECORDS	RETENTION PERIOD
General correspondence	1 year from date of record
Permanent student records	55 years from date the student withdraws or graduates from school
Other student records	Refer to AP ____ - Student Records