

JAMES BAY LOWLANDS SECONDARY SCHOOL BOARD
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ADMINISTRATIVE PROCEDURE GENERAL ADMINISTRATION: NO. 190	
Effective	August 21, 2019
Last Revised	June 30, 2023

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RECORDS RETENTION

PURPOSE

The James Bay Lowlands Secondary School Board requires that a record management program be instituted to control the collection, use, maintenance, retention, and destruction of documents, records, and other papers which are the property of the Board.

The creation and management of Board records shall be in accordance with the provisions of the *Education Act*, the *Municipal Freedom of Information and Protection of Privacy Act*, the *Personal Health Information and Protection Act*, and other relevant statutes and regulations of the Province of Ontario and the Government of Canada.

PROCEDURES

1. Collection of Information

All forms used within the school system must be approved by the Director of Education prior to use. Approval forms will be assigned an internal control number. Forms used to collect personal information will also be assigned a notification stating:

- a) the legal authority for the collection of personal information;
- b) the principal purpose(s) for which the personal information is intended to be used;
and
- c) from whom and where the individual(s) may obtain further information regarding the collection of this information.

2. Use of Personal Information

The Board may use personal information in its custody or control for any purpose which is consistent with the *Education Act*, Board policy and/or administrative procedures and the *Municipal Freedom of Information and Protection Act*.

3. Maintenance, Retention and Destruction of Records

Records shall be filed, retained, and destroyed in accordance with the Board's approved records management system. [See Appendix A.]

4. Security Provisions

- 4.1. All Board staff members have the responsibility to maintain confidentiality with respect to personal information which comes to their attention in the course of their work.
- 4.2. Access to personal information kept by the Board shall be restricted to the individual about whom the information refers, the Board personnel who have a need to this information in the course of their work, and to such others as is admissible within the terms of the *Municipal Freedom of Information and Protection of Privacy Act*.
- 4.3. Copies of original records containing confidential and personal information are to be kept at an absolute minimum. As soon as the user has finished with them, they are to be destroyed by shredding, incineration, erasing in the case of computerized records, or any other such means as may be approved by the supervisory officer.
- 4.4. Personal information shall be secured in locked cabinets or otherwise controlled within a restricted area. This includes information kept in binders.
- 4.5. Personal and confidential correspondence, reports and records that are typed on computerized equipment will either:
 - a) be erased when the final hard copy has been filed in the paper records filing system; or
 - b) be secured with a computer password or locked on the computer hardware. Passwords will be changed on a regular basis.
- 4.6. Staff members who work with records containing personal and confidential information shall exercise routine security precautions such as a clean desk at the end of the day, turning confidential material face-down, and turning computer screens away from the view of others.

5. Records Catalogue

- 5.1. The supervisory officer shall maintain a records catalogue containing a copy of the following information:
 - a) the Board's record classification system;
 - b) the Board's record retention schedule;
 - c) the Board's personal information banks;
 - d) a list of active files in the school/Board office;
 - e) a list of inactive files in storage; and
 - f) a list of destroyed files.

6. Discontinuance of the Board

In the case of dissolution of the Board, the records of the Board shall be filed with the Ministry of Education in accordance with the *Education Act*.

REFERENCE DOCUMENTS

Legal:

Education Act, Section 171 (1) paragraph 38 Powers of Boards: Records Management

Education Act, Section 265 Duties of Principal: Pupil Records

Education Act, Section 283: Chief Executive Officer: Effective Organization

Ontario Student Record Guideline

Municipal Freedom of Information and Protection of Privacy Act

Personal Health Information and Protection Act

Employment Standards Act

Labour Relations Act

Board:

Board Policy GOV-03 Role of the Supervisory Officer

Administrative Procedure 306 Ontario Student Record

APPENDIX A

RECORD RETENTION SCHEDULE

All receipts, vouchers, records (including electronic records), papers, or other documents pertaining to the Board shall be retained for such periods as are set forth in Schedule A below:

SCHEDULE A

PARTICULARS	NO. OF YEARS AFTER LAST ENTRY
Disbursement Voucher including cancelled cheques	6 years
Bank Cheques	6 years
Duplicate Receipts	6 years
All Books of Original Entry (i.e., General Journal, Cash Receipts Journal, Cash Payments Journal, Accounts Payable Journal, Payroll Journal)	10 years
Payroll Records	7 years
Correspondence	5 years
Sales Invoices Copies	3 years
Time Sheets	2 years
Insurance Policies	Upon Expiry
Subsidiary Ledgers—Accounts Receivable	6 years
One (1) Copy of Audited Annual Financial Statement	Permanent Retention
General Ledger	Permanent Retention
Minute Book	Permanent Retention
By-Laws	Permanent Retention