

RECORDS MANAGEMENT



RECORDS RETENTION, DISPOSITION and FILING GUIDELINES

Primary File	Primary File Name	File Number	File Title	Retention Period in Years	Final Disposition
100	ADMINISTRATION - GENERAL	Include Battle River Regional Division correspondence and policies relating to Code of Conduct, Board of Trustees, Policies and Regulations - Alberta Education, ASBA, PSBAA and ASBOA, and general administration for the division not found elsewhere in this block.			
		100-000	POLICY AND PROCEDURES		perm.*
		100-001	GENERAL	2 yrs	destroy
108	ADMINISTRATION - LEGAL MATTERS, OPINIONS AND DECISIONS AND DISPUTES	Includes general information relating to Legal Matters, including opinions, decisions and disputes by individual name when applicable.			
		108-000	POLICY AND PROCEDURES		perm.*
		108-001	GENERAL		perm.
109	ADMINISTRATION - ENROLMENT	Includes general information relating to enrolment statistics for current and previous years.			
		109-000	POLICY AND PROCEDURES		perm.*
		109-001	GENERAL	10 + selective	destroy
110	ADMINISTRATION - SCHOOL COUNCILS	Includes General Information relating to procedures and administration functions for school councils.			
		110-000	POLICY AND PROCEDURES		perm.*
		110-001	GENERAL	5 yrs	destroy
112	ADMINISTRATION - SCHOOLS - GENERAL	Includes general Information relating to the policies and procedures, administrative functions and activities relevant to Battle River Regional Division Schools. For Individual School Administration - See 115.			
		112-000	POLICY AND PROCEDURES		perm.*
		112-001	GENERAL	5 yrs	destroy
115	ADMNISTRATION - INDIVIDUAL SCHOOL	Includes general Information relating to the administrative functions for schools, i.e. - attendance, incidents, accidents, staffing, operational days, issues and concerns, etc., by name of school. Also includes kindergarten private contracts, insurance claims, etc., by individual facility.			
		115-000	POLICY AND PROCEDURES		perm.*
		115-001	GENERAL	7 yrs	destroy
		115-001-01	SCHOOL COUNCIL MEETINGS / REPORTS		perm.
		115-001-02	HANDBOOKS	3 yrs	destroy
		115-001-03	ISSUES AND CONCERNS		perm.
		115-001-05	FIELD TRIPS	10 yrs	destroy
		115-001-06	SUSPENSIONS / EXPULSIONS	5 yrs	destroy
		115-001-07	APPLICATION FOR APPROVAL OF OFF CAMPUS EDUCATION	5 yrs	destroy
		115-001-08	NEWSLETTERS	Yr. End	destroy
		115-001-10	ANNUAL REPORTS		perm.
		115-001-11	TECHNOLOGY PLAN	10 yrs.	destroy

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117	ADMINISTRATION – HEALTH & SAFETY	This section includes correspondence, plans for immunization and information on individual health regions.			
		117-000	POLICY AND PROCEDURES		perm.*
		117-001	GENERAL		perm.
118	ADMINISTRATION – OCCUPATIONAL HEALTH & SAFETY	This section includes records relating to the administration of a safe and healthy working environment including factors such as; programs, first aid; occupational health, smoking in the workplace, lighting and stress, noise levels, evacuation procedures for fire and bomb threats.			
		118-000	POLICY AND PROCEDURES		perm.*
		118-001	GENERAL	3 yrs +	destroy
122	ADMINISTRATION - ORGANIZATION - BATTLE RIVER REGIONAL DIVISION	Includes correspondence, policies, procedures and regulations for establishing Battle River Regional Division and its responsibilities, including organization changes.			
		122-000	POLICY AND PROCEDURES		perm.*
		122-001	GENERAL		perm.
130	ADMINISTRATION - ACTS AND LEGISLATION - ALBERTA	Includes acts, regulations, bills, rulings and orders, and amendments relating to Alberta acts and legislation.			
		130-000	POLICY AND PROCEDURES		perm.*
		130-001	GENERAL		perm.
		130-C01	CHARITABLE FUND RAISING ACT		perm.
		130-C02	COMMISSIONER OF OATHS		perm.
		130-C03	COPYRIGHT ACT		perm.
		130-E01	EMPLOYMENT INSURANCE ACT		perm.
		130-E02	EDUCATION SERVICES SETTLEMENT ACT		perm.
		130-F01	FREEDOM OF INFORMATION AND PROTECTION OF PRIVACY ACT		perm.
		130-F02	FOUNDATION FOR PEACE & MULTICULTURALISM		perm.
		130-L01	LOCAL AUTHORITIES ELECTION ACT (BILL 205)		perm.
		130-S01	SCHOOL ACT		perm.
		130-S01-01	SPECIAL TAX LEVY		perm.
		130-T01	TEACHING PROFESSION ACT		perm.
		130-T02	TOBACCO INDUSTRY RESPONSIBILITY ACT		perm.
		130-Y01	YOUNG OFFENDER INFORMATION SHARING PROTOCOL		perm.
		130-Y02	YOUTH PREVENTION OF TOBACCO ACT, 1999		perm.

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135	ADMINISTRATION - APPRECIATION, COMPLAINTS AND INQUIRIES	Includes letters of appreciation, congratulations, Christmas greetings, messages and inquiries of a general nature.			
		135-000	POLICY AND PROCEDURES		perm.*
		135-001	GENERAL	2 yrs	destroy
		135-S01	STUDENT RECORDS - RELEASE		perm.
		135-T01	THANK YOU LETTERS	Yr. End	destroy
140	ADMINISTRATION - ASSOCIATIONS, CLUBS, SOCIETIES AND FOUNDATIONS	Includes proceedings, minutes, memberships and fees, financial statements, offers of services relating to associations, clubs and societies.			
		140-000	POLICY AND PROCEDURES		perm.*
		140-001	GENERAL	2 yrs.	destroy
145	ADMINISTRATION - AWARDS, HONORS AND SCHOLARSHIPS - GENERAL	Includes correspondence, general information, recipients and criteria for awards, honors and scholarships.			
		145-000	POLICY AND PROCEDURES		perm.*
		145-001	GENERAL		perm.
150	ADMINISTRATION - COMMUNITY / BUSINESS INVOLVEMENT	Includes correspondence, general information			
		150-000	POLICY AND PROCEDURES		perm.*
		150-001	GENERAL	3 + selective	destroy
155	ADMINISTRATION - CORPORATIONS, COMPANIES AND FIRMS	Includes correspondence of a general nature, solicitations, brochures, offers of service, etc.			
		155-000	POLICY AND PROCEDURES		perm.*
		155-001	GENERAL	2 yrs.	destroy
160	ADMINISTRATION - COMMITTEES, COUNCILS, CONSORTIUMS AND TASK FORCES	Includes correspondence on the establishment, organization, functions, agenda, notices, minutes, reports, etc., of committees and sub-committees. For Children's Services - See 715.			
		160-000	POLICY AND PROCEDURES		perm.*
		160-001	GENERAL	10 yrs.	destroy
165	ADMINISTRATION - CONFERENCES AND WORKING GROUPS	Includes correspondence on the establishment, organization, functions, agendas, notices, minutes, reports, etc., for conferences, task forces and forums.			
		165-000	POLICY AND PROCEDURES		perm.*
		165-001	GENERAL	2 + selective	destroy

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170	ADMINISTRATION - EVENTS AND ATTRACTIONS	Includes general information, invitations, plans, itineraries, etc., for special events and attractions.			
		170-000	POLICY AND PROCEDURES		perm.*
		170-001	GENERAL	1 yr	destroy
175	ADMINISTRATION - MEETINGS	Includes meetings for Board Chair, annual general meeting, minutes, agendas, etc., by individual meeting name. For individual committee records, etc. - See 160 For Children's Services - See 715			
		175-000	POLICY AND PROCEDURES		perm.*
		175-001	GENERAL		perm
180	ADMINISTRATION - NEWS RELEASES AND PUBLICATIONS	Includes correspondence, policy, reports, etc., relating to news releases and publications including actual news releases and publications - i.e. - ASBA, Hot News, Alberta Education News Releases, Labour Relations Bulletins, BRRD news releases and publications.			
		180-000	POLICY AND PROCEDURES		perm.*
		180-001	GENERAL	Yr. End	destroy
190	ADMINISTRATION - EQUIPMENT AND FURNISHINGS	Includes correspondence related to procurement and purchase requirements, including inventories and direct purchase orders, furniture, operating manuals, warranties.			
		190-000	POLICY AND PROCEDURES		perm.*
		190-001	GENERAL	Until Obsolete	destroy
191	ADMINISTRATION - EQUIPMENT AND FURNISHINGS - INDIVIDUAL SCHOOLS	Includes correspondence related to procurement and purchase requirements, including inventories and direct purchase orders, furniture, operating manuals, warranties.			
		191-000	POLICY AND PROCEDURES		perm.*
		191-001	GENERAL	Until Obsolete	destroy
195	ADMINISTRATION - RECORDS MANAGEMENT	Includes policies, procedures and correspondence relevant to the records management program.			
		195-000	POLICY AND PROCEDURES		perm.*
		195-001	GENERAL		perm.
197	ADMINISTRATION - FREEDOM OF INFORMATION AND PROTECTION OF PRIVACY	Includes correspondence relating to FOIP legislation, information from provincial government, Commissioner's Office, individual FOIP requests (formal and informal), and the administrative process. For Freedom of Information and Protection of Privacy Act - See 130			
		197-000	POLICY AND PROCEDURES		perm.*
		197-001	GENERAL		perm.

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200	ADMINISTRATION - REPORTS, SURVEYS AND STATISTICS	Includes drafts and general correspondence for monthly and annual reports, reports of a specific nature published by other sources, surveys and statistics, including supporting documents.			
		200-000	POLICY AND PROCEDURES		perm.*
		200-001	GENERAL	5 yrs	destroy
210	ADMINISTRATION - TECHNOLOGY - GENERAL	Including correspondence relating to the development or consideration of computer systems and programs, feasibility studies, monitoring of application tests, etc.			
		210-000	POLICIES AND PROCEDURES		perm.*
		210-001	GENERAL	5 yrs	destroy
211	ADMINISTRATION – TECHNOLOGY – SOFTWARE	Includes policies, procedures and correspondence relevant to the software programs operated by the school/facility.			
		211-000	POLICIES AND PROCEDURES		perm.*
		211-001	GENERAL	5 yrs	destroy
212	ADMINISTRATION – TECHNOLOGY – HARDWARE	Includes policies, procedures and correspondence repairs, issues and concerns relevant to the hardware used by the school/facility.			
		212-000	POLICIES AND PROCEDURES		perm.*
		212-001	GENERAL	5 yrs	destroy
225	ADMINISTRATION - UNIVERSITIES, COLLEGES AND OTHER INSTITUTIONS	Includes correspondence relating to cooperation and liaison activities with universities, schools, colleges, and other institutions. Does not include Curriculum - See 240.			
		225-000	POLICY AND PROCEDURES		perm.*
		225-001	GENERAL	1 yr	destroy
240	CURRICULUM - GENERAL	General correspondence, guidelines, repeats, studies, and reviews of curriculum not shown elsewhere in this block.			
		240-000	POLICY AND PROCEDURES		perm.*
		240-001	GENERAL	5 yrs	destroy
250	CURRICULUM - ACHIEVEMENT TESTS	General correspondence, policy, registration lists, special provisions and exemptions, etc., for achievement tests.			
		250-000	POLICY AND PROCEDURES		perm.*
		250-001	GENERAL	5 yrs	destroy
251	CURRICULUM - ACHIEVEMENT TESTS - RESULTS, ANALYSIS AND MONITORING	Includes test results and the policies, procedures and correspondence relating to the analysis and evaluation of achievement test results and monitoring by Alberta Education.			
		251-000	POLICY AND PROCEDURES		perm.*
		251-001	GENERAL	5 yrs	destroy

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260	CURRICULUM - DIPLOMA EXAMS	Includes policies and procedures, correspondence relating to the administration of provincial diploma exams, including schedules, request for special provisions/exemptions, and nominee for Student Evaluation Branch committees, exam markers and field testing locations. For the results, analysis and monitoring of diploma exams - See 261.			
		260-000	POLICY AND PROCEDURES		perm.*
		260-001	GENERAL	5 yrs	destroy
261	CURRICULUM - DIPLOMA EXAMS - RESULTS, ANALYSIS AND MONITORING	Includes exam results and policies, procedures, correspondence relating to the analysis and evaluation of the results and monitoring by Alberta Education.			
		261-000	POLICY AND PROCEDURES		perm.*
		261-001	GENERAL	5 yrs	destroy
270	CURRICULUM GUIDES	Includes general correspondence, program guides, reviews and revisions, achievement tests and diploma exams, and results by individual subject.			
		270-000	POLICY AND PROCEDURES		perm.*
		270-001	GENERAL	5 yrs	destroy
300	FACILITIES / LANDS / PROPERTIES - GENERAL	Includes correspondence of a general nature relating to facilities and sites, current and future planning, plans for expansion, space allocation, proposed sub-divisions, etc., not shown elsewhere in this block.			
		300-000	POLICY AND PROCEDURES		perm.*
		300-001	GENERAL		perm.
307	FACILITIES / LANDS / PROPERTIES - LAND TITLES				
		307-000	GENERAL		perm.
310	FACILITIES - CAPITAL PROJECTS - INDIVIDUAL	Includes policy, procedures, correspondence, planning, project management, budget expenditures, meetings, approvals for capital projects.			
		310-000	POLICY AND PROCEDURES		perm.*
		310-001	GENERAL		perm.
312	FACILITIES - CAPITAL PROJECTS - GENERAL	Includes policies, procedures, correspondence, planning, meetings, RFPs, construction, design, progress reports, deficiency reports, and change orders by individual project.			
		312-000	POLICY AND PROCEDURES		perm.*
		312-001	GENERAL		perm.
320	FACILITIES - IMR PROJECTS	Includes policy, procedures, yearly plan, meetings, requests for proposals, selection and all project management components specific to individual IMR projects.			
		320-000	POLICIES AND PROCEDURES		perm.*
		320-001	GENERAL	7 yrs	destroy
		320-P01	PROPOSED PROJECTS	7 yrs	destroy

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		320-P02	PROJECTS CURRENT YEAR	7 yrs	destroy
		320-P03	PROJECTS PREVIOUS YEARS	7 yrs	destroy
325	FACILITIES/MAINTENANCE - GENERAL	This section relates to the information of a general nature specific to all sites or subjects but not specific to any one school/facility, including special projects not site-specific.			
		325-000	POLICY AND PROCEDURES		perm.*
		325-001	GENERAL	2 yrs	destroy
		325-M01	MAINTENANCE REQUESTS - INDIVIDUAL SCHOOLS	2 yrs	destroy
350	FINANCE - GENERAL	Includes financial management and planning, revenue management, year-end processing of accounts and other operational financial issues not shown elsewhere in this block.			
		350-000	POLICY AND PROCEDURES		perm.*
		350-001	GENERAL	7 yrs	destroy
360	FINANCE - AUDITS	Includes administration of auditing matters, methods, procedures and responsibilities for performing required audits, compiling information, fiscal reports and reviews, and other issues pertaining to the financial and operational activities of the jurisdiction to ensure that internal accounting and operating controls function properly.			
		360-000	POLICY AND PROCEDURES		perm.*
		360-001	GENERAL		perm.
375	FINANCE - BUDGET - GENERAL	Includes budgeting practices and procedures, budgeting controls and programs, budget planning reports, development of operational budget and business plan, budget reduction strategies, forecasting budget estimates, correspondence and documents relating to budget submissions and approvals, liability information, etc.			
		375-000	POLICY AND PROCEDURES		perm.*
		375-001	GENERAL	7 yrs	destroy
		375-B01	BUDGET REPORT	7 yrs	destroy
380	FINANCE - BUDGET PREPARATION / SUBMISSION	Includes correspondence and document issues calling for budget estimates, preparation and submission for specific periods and the related guidelines and instruction, budget estimates and supporting justification, etc.			
		380-000	POLICY AND PROCEDURES		perm.*
		380-001	GENERAL	7 yrs	destroy
		380-S01	SUBMISSION / ALBERTA EDUCATION - CURRENT YEAR		perm.
		380-S02	SUBMISSION / APPROVAL - ALBERTA EDUCATION - PREVIOUS YEAR		perm.

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390	FINANCE - BUDGET PREPARATION / SUBMISSION - INDIVIDUAL SCHOOLS	Includes correspondence and documents calling for budget estimates, preparation and submission for specific periods and the related guidelines and instruction for individual schools.			
		390-000	POLICY AND GUIDELINES		perm.*
		390-001	GENERAL	7 yrs	destroy
410	FINANCE - CASH AND BANKING	Cash and banking policies, deposit procedures, direct deposit set-up, verification and distribution of cash, cash control, currency exchange, submissions and returns, cash handling violations, NSF and return items, bank account closures and deletion of signing authority, credit card approval and cancellation, debentures, borrowing, by-laws and bankruptcy.			
		410-000	POLICY AND PROCEDURES		perm.*
		410-001	GENERAL	7 yrs	destroy
		410-C01	CREDIT CARDS	7 yrs	destroy
		410-C02	CREDIT APPLICATIONS	7 yrs	destroy
		410-D01	DEBENTURES - ACTIVE	7 yrs	destroy
		410-D02	DEBENTURES - CANCELLED	7 yrs	destroy
		410-D03	DEBENTURES - LOAN INFORMATION AND TOTALS	7 yrs	destroy
425	FINANCE - CONTRACTS, AGREEMENTS AND LEASES	Includes policy, request for proposals, guidelines, procedures to bill contract for services, including individual contracts and the hiring of consultants.			
		425-000	POLICY AND PROCEDURES		perm.*
		425-001	GENERAL		perm.
480	FINANCE - FUNDS AND GRANTS - GENERAL	Includes requests, status reports, expenditures, etc., relating to funding and grants for specific projects.			
		480-000	POLICY AND PROCEDURES		perm.*
		480-001	GENERAL	7 yrs	destroy
485	FINANCE - FUNDS AND GRANTS - FUNDING FOR SCHOOL AUTHORITIES	Policies, procedures, correspondence relevant to funds and grants for the jurisdiction.			
		485-000	POLICY AND PROCEDURES		perm.*
		485-001	GENERAL	7 yrs	destroy
		485-002	SPECIAL EDUCATION	7 yrs	destroy
		485-003	TECHNOLOGY	7 yrs	destroy
		485-004	TRANSPORTATION	7 yrs	destroy
510	FINANCE - FUNDS AND GRANTS - CAPITAL PROJECTS	Information and correspondence plans, budgets, RFP's, contractors, etc., by individual capital project.			
		510-000	POLICY AND PROCEDURES		perm.*
		510-001	GENERAL	7 yrs	destroy

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520	INSURANCE - GENERAL	Includes correspondence relating to insurance policies taken out for vehicles, automobiles, property, heavy equipment, bond and crime, accidents, etc.			
		520-000	POLICY AND PROCEDURES		perm.*
		520-001	GENERAL		perm.
525	INSURANCE CLAIMS - GENERAL	Includes policies and correspondence, reports, regulations and procedures for claims by individual claim.			
		525-000	POLICY AND PROCEDURES		perm.*
		525-001	GENERAL		perm.
550	HUMAN RESOURCES - GENERAL	Includes correspondence relating to the operational functions of the human resources function not shown elsewhere in this block.			
		550-000	POLICY AND PROCEDURES		perm.*
		550-001	GENERAL	3 yrs	destroy
560	HUMAN RESOURCES - RECRUITMENT AND SELECTION - GENERAL	This section includes advertising, applications, procedures and transferred information on recruitment and selection.			
		560-000	POLICY AND PROCEDURES		perm.*
		560-001	GENERAL	Yr. End	destroy
580	HUMAN RESOURCES - LABOUR RELATIONS - GENERAL	This section includes negotiations and correspondence for ATA, CUPE and senior administration. For actual contracts - See 425			
		580-000	POLICY AND PROCEDURES		perm.*
		580-001	GENERAL	10 yrs	destroy
590	HUMAN RESOURCES - PAY, BENEFITS AND DEDUCTIONS	This section includes correspondence and information relevant to ASEBP and any other direct deductions from employee payroll.			
		590-000	POLICY AND PROCEDURES		perm.*
		590-001	GENERAL	7 yrs	destroy
630	HUMAN RESOURCES - PROFESSIONAL DEVELOPMENT - GENERAL	General correspondence, calendars, courses and seminars, attendance, listed by individual course.			
		630-000	POLICY AND PROCEDURES		perm.*
		630-001	GENERAL	5 yrs + selective	destroy
654	HUMAN RESOURCES - RETIREMENT/SEVERANCE	Includes correspondence and guidelines for resignation and termination process and information on early retirement and voluntary severance.			
		640-000	POLICY AND PROCEDURES		perm.*
		640-001	GENERAL	5 yrs	destroy

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700	PLANS, PROGRAMS AND PROJECTS - GENERAL	Includes administration policies, procedures, guidelines and correspondence relating to foreign study, teacher bursary, virtual school, construction, Edu-Link, etc.			
		700-000	POLICY AND PROCEDURES		perm.*
		700-001	GENERAL	5 yrs	destroy
710	PLANS, PROGRAMS AND PROJECTS - THREE YEAR PLAN - EDUCATION	Includes administrative policies, procedures, and guidelines relating to program planning, activities of the jurisdiction in accordance with Alberta Education guidelines and/or regulations. For The Year Business Plan, Education Plans and Annual Education Results Reports for individual schools - See 711			
		710-000	POLICY AND PROCEDURES		perm.*
		710-001	GENERAL	5 yrs	destroy
711	PLANS, PROGRAMS AND PROJECTS - THREE-YEAR PLAN - INDIVIDUAL SCHOOLS	Includes administration policies, procedures and guidelines relating to the program planning by schools to support the jurisdiction's Three-Year Plan.			
		711-000	POLICY AND PROCEDURES		perm.*
		711-001	GENERAL	10 yrs	destroy
715	PLANS, PROGRAMS AND PROJECTS - CHILDRENS' SERVICES	Includes administration policies, procedures, guidelines and information regarding activities under the umbrella of the Office of the Commissioner of Children's Services.			
		715-000	POLICY AND PROCEDURES		perm.*
		715-001	GENERAL		perm.
750	INCLUSIVE EDUCATION - GENERAL	Includes policies, procedures, meetings, administrative directives, professional technical services, appeals procedures, field testing and correspondence not shown elsewhere in this block.			
		750-000	POLICY AND PROCEDURES		perm.*
		750-001	GENERAL	5 yrs	destroy
752	INCLUSIVE EDUCATION - SCHOOL	Includes policies, procedures, meetings, professional technical services, issues and concerns, inventory of special needs and general correspondence specific to the school.			
		752-000	POLICY AND PROCEDURES		perm.*
		752-001	GENERAL	7 yrs	destroy
755	INCLUSIVE EDUCATION - GUIDANCE AND COUNSELING - GENERAL	Includes policies, procedures, guidelines and correspondence for guidance and counseling.			
		755-000	POLICY AND PROCEDURES		perm.*
		755-001	GENERAL	7 yrs + selective	destroy

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756	INCLUSIVE EDUCATION - GUIDANCE AND COUNSELING - COUNSELING SERVICES FOR YOUTH	Includes policies, procedures, guidelines and correspondence for counseling and seminars for youth. This section includes all components of the program i.e. meetings, counselors' logs, etc.			
		756-001	POLICY AND PROCEDURES		perm.*
		756-001	GENERAL	7 yrs	destroy
760	TRANSPORTATION - GENERAL	Includes policies, procedures, correspondence and information relevant to transporting students to and from schools and for co-curricular and extra-curricular functions.			
		760-000	POLICY AND PROCEDURES		perm.*
		760-001	GENERAL	7 yrs	destroy