Schedule 580A: Parkland School Division Records Retention

Functions	Pages	Overview Description
Administrative Management	2-3	Administration of teams and units within the Division
Corporate Governance	3-6	Governing boards / schools and exercising legal authority and control
Community Programs and Services	6-7	Offering programs and services to the community through school and board and school authority facilities
Educational Programs	7-8	Applying curriculum guidelines and designing education programs for students.
Finance and Accounting	8-12	Managing board and school financial and accounting resources
Facilities Management	13-15	Managing and maintaining board and school authority buildings and facilities and supporting capital initiatives and building improvements.
Human Resources	15-20	Managing all employees within the organization in accordance with policies and procedures
Health and Safety	20-22	Promoting health and safety, and encouraging attitudes and methods that will lead to improved wellness in the division
Information Management	22-26	Applying and managing information and communications technology to support the business needs of the organization to capture, store, retrieve, transfer, communicate and disseminate information
Legal	26-29	Addressing legal issues relating to the operations of the board and schools
Communication	29-31	Promoting and marketing board and school programs and services
Research and Planning	31-32	Undertaking research and planning to support the ongoing operations of the school and board
Student Information	32-38	Providing students with programs and services in accordance with the Education Act
Transportation	38-	Providing students with transportation

Schedule 580A: Parkland School Division Records Retention

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
AM	**Administrative Management**	**The function of overseeing the administration of teams and units within the Division. Records supporting this function relate to administrative committees' decisions and meetings, and internal administrative support or services.**						
AM-01	Associations and Organizations	Includes reports, newsletters, publications, conference and workshop information, and proceedings from organizations to which staff belong.	Originating Department	E = 0	E = Aug. 31	Operational Value		Alberta Teachers Association Associations, Clubs and Societies Conferences, Meetings, Seminars and Symposia
AM-02	Committees - Internal and External	Includes records of committees and councils on which staff members participate as members. Records include meeting minutes, notices, reports, recommendations and supporting documentation. Excludes School Councils See CG-06 Excludes Corporate Governance Committees See CG-03	Originating Department	E + 3 Y	E = Aug. 31	Operational Value		
AM-03	Forms / Template Inventory	Includes templates and forms used by the Division.	Originating Department	E = 0	E = Until next version is developed	Operational Value		
AM-04	Information Requests	Includes records of queries for information about the Division received from many sources including the Web site.	Originating Department	E + 1 Y	E = Aug. 31	Operational Value		
AM-05	Liaison	Includes records regarding information exchange between the Division and other Divisions, groups and organizations.	Originating Department	E + 1 Y	E = Aug. 31	Operational Value		
AM-06-01	Meetings – Internal	Includes records such as agendas, minutes, reports and resolutions from internal meetings involving staff. Excludes Corporate Governance Committees See CG-03	Originating Department / Schools	E + 3 Y	E = Aug. 31	Operational Value		

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
AM-06-02	Meetings – Senior Management and Administration	Includes records from Senior Management Team Meetings, such as the Superintendent, Associate Superintendents, Directors, Principals, and Vice Principals. Includes minutes, agendas, records of decision, terms of reference, and supporting documents. Excludes Corporate Governance Committees (e.g., admin. council, exec. council, etc.) See CG-03	Originating Department	E + 3 Y	E = Aug. 31	Operational Value		
AM-07	School Operations and Evaluation	Includes records relating to the operation and evaluation of school operations as part of the Division's activities for efficient and effective school operations. Includes school management, program operation, organization, implementation of processes and procedures, and evaluation.	Superintendent's Office	E + 5 Y	E = Aug. 31	Operational Value		School Evaluations
AM-08	Service Requisitions and Reports for Services	Includes records relating to translation, audio visual services, duplicating / printing services and mail / courier services, requisitions and memos for services, confirmations and service logs / reports, correspondence, reports, etc.	Financial Services	E + 3 Y	E = Aug. 31	Operational Value		
CG	**Corporate Governance**	**The function of governing boards / schools and exercising legal authority and control. The corporate governance structure specifies the distribution of rights and responsibilities among different participants in boards / schools, such as the board and staff, and spells out the rules and procedures for making decisions on its affairs. Includes resolutions, bylaws, policies and procedures, charters, board meeting administration, and strategic planning.**						
CG-01	Articles of Incorporation, By-laws and Constitution	Includes records related to the operation of the school division and details about the legal entity.	Corporate Supports and Services	E + 2 Y	E = Dissolution of the Division	Archival		Bylaws, Orders and Directives
CG-02	Program Administration	Includes records related to division wide and / or area program oversight, and administration of programs that do not belong to a specific function. Excludes Educational Programs, Community Programs, Health and Safety Programs, etc. See applicable functional series.	Originating Department	E + 3 Y	E = Aug. 31	Operational Value Archival		

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
CG-03	Committees - General	Includes routine committee work such as school standing, ad hoc committees, directors' steering, advisory committees, and task forces. Examples include the Employee Assistance Program Advisory Committee and Special Education Advisory Committee. Records include agendas, minutes, reports, and supporting documentation.	Originating Department	E + 3 Y	E = Aug. 31	Operational Value	PIB	
CG-04-01	Board of Trustees	Includes records of minutes, agendas and supporting documentation for Board of Trustees.	Office of Superintendent	Permanent	E = Aug. 31	Archival		Board of Trustees Official Minutes and Agendas
CG-04-02	Board of Trustees – Proceedings	Includes records of audio and / or video recordings of Board meetings.	Office of Superintendent	E + 1 Y	E = Meeting Date	Operational Value		
CG-04-03	Committees of the Board	Includes records of committees consisting of Trustees, created by the board for a specific purpose such as Audit, ATA, Benefit Plan Advisory, CAAMSE, Council of School Councils, IU, PSBAA, Rural Caucus of Alberta School Boards, Spruce Grove Joint use, Stony Plain Joint Use, TBAC, TEBA. Includes agendas, minutes, resolutions, terms of reference, meeting briefs and supporting documentation.	Office of Superintendent	Permanent	E = Aug. 31	Archival	PIB	Board Committees Committees of the Board
CG-04-04	Committees – External Board	Includes records of external committees and councils on which board members / trustees sit. Records include agendas, reports, resolutions and any documentation which reflects obligations of the board.	Office of Superintendent	E + 5 Y	E = Aug. 31	Operational Value	PIB	
CG-05	School Calendar	Includes records related to the development and approval of the annual School Calendar.	Office of Superintendent	Permanent	E = Aug. 31	Operational Value Archival		School Calendars School Operations – Instructional Programming
CG-06	School Councils	Includes records of school councils such as agendas, minutes, Terms of Reference, and supporting documentation. Excludes Parent societies / associations / advisory committees. These are separate entities from the Division. Some content may be Archival, to be retained for permanent preservation.	Schools / Office of Superintendent	E + 7 Y	E = Aug. 31	Operational Value Archival		School Council

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
CG-07 – 01	Guidelines, Policies and Directives - External	Includes records about initiatives and guidelines provided by Alberta Education and similar organizations. Records include memoranda, directives, and correspondence such as Alberta Education Guidelines and Ministry Policy / Program Memoranda.	Office of Superintendent	E + 5 Y	E = Until superseded or obsolete	Operational Value		Policy and Procedures
CG-07-02	Guidelines, Policies and Directives – Board Approved	Includes records relating to the development and approval of board and school operating practices, activities, and policies that apply district-wide that have been approved by the Board. Includes best practices, guidelines, procedures, and standards.	Office of Superintendent	Permanent	E = Until superseded or obsolete	Operational Value Archival		Policy and Procedures
CG-07-03	Guidelines, Policies and Directives - Administrative	Includes records regarding directives approved by the Superintendent referencing internal controls. Records may also include regulations and procedure manuals, guidelines and directives, and all other procedures established by departments and programs.	Office of Superintendent	Permanent	E = Until superseded obsolete	Archival		Policy and Procedures
CG-08	Intergovernmental Reporting and Communication	Includes correspondence and reports between the board and various levels of government such as the municipality, provincial ministries, etc. Also includes correspondence and information on other school boards.	Office of Superintendent	E + 5 Y	E = Aug. 31	Operational value.		Community Involvement – General
CG-09	Organization Structure	Includes records regarding reporting relationships, organization structure, organization analysis, etc. for both schools and school board. Includes organizational charts and school profiles.	Office of Superintendent	Permanent	E = Aug. 31	Operational Value Archival		
CG-10	Trustee Management	Includes election information, personal information, directories and news items regarding the Trustees. Also includes trustees' distribution and orientation information.	Office of Superintendent	E + 2 Y	E = Expiry of term of office		PIB	
CG-11	Elections	Includes records of election procedures and information. NOTE: Ballot boxes are to be kept sealed for 6 weeks following the election (Section 101 of the LAEA). Nomination papers are kept for the term of the office (Section 28(5) of the LAEA).	Corporate Supports and Services / Office of Superintendent	E + 10 Y	E = Until superseded or obsolete	Operational Value		Elections and Demographics

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
CG-12	Information Requests from Trustees	Includes information collected in response to specific requests from Trustees. Includes ad hoc requests for information, speaking notes, and parent complaints.	Office of Superintendent	E + 3 Y	E = Aug. 31	Operational Value		
CG-13	Complaints and Inquiries	Includes records related to complaints and inquiries about the Division and / or schools, and activities. Includes correspondence, investigations, findings and related reports regarding resolution.	Office of Superintendent	E + 1 Y	E = Aug. 31			Appreciation, Complaints, Inquiries
CG-14	Regional Collaborative Service Delivery	Includes records regarding regional delivery of specialized services (e.g. mental health) in partnership with other entities such as Alberta Health, and for provision of services, such as transportation provided to nearby school divisions e.g. Evergreen.	Financial Services / Transportation / Corporate Supports and Services	E + 7 Y	E = Aug. 31			
CG-15	Whistleblower Disclosure	Includes records related to disclosures made under the Public Interest Disclosure (Whistleblower Protection) Act.	Human Resources	E + 5 Y	E = Until investigation completed and case closed			
CP	**Community Programs and Services**	**The function of offering programs and services to the community through school and board and school authority facilities. Generally refers to programs that are not part of day school.**						
CP-01	Child Care Services	Includes records related to child care programs, and / or play schools such as community consultation, potential lease arrangements, costs, and insurance coverage.	Schools	E + 7 Y	E = Aug. 31			
CP-02	Community Programs and Services	Includes records on the administration of specific programs, program reviews, and reports of the activities for community liaison officers.	Originating Department	E + 1 Y	E = After the program has ended			
CP-03	Community Programs	Includes objectives, lesson units, reports, program reviews, teaching materials, promotion and advertising for programs that support families, educators, parents and students, such as the Strong Families Series.	Originating Department	E + 7 Y	E = Aug. 31			
CP-04	Community Programs - Parks and Recreation	Includes correspondence and records of programs such as swimming and fitness made available through the City of Spruce Grove and similar service providers.	Originating Department	E + 2 Y	E = Aug. 31			

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
CP-05	Volunteer Program – Recruitment and Recognition	Includes records for volunteer programs such as recruitment, receptions, and volunteer activities in schools. For volunteer procedures and guidelines See HR-19-02.	Originating Department	E + 1 Y	E = Until superseded or obsolete	Operational Value		
EP	**Educational Programs**	**The function of applying curriculum guidelines and designing education programs for students. Records include, but are not limited to, proposals, correspondence, lesson plans, and course outlines.**						
EP-01	Development and Design	Includes records relating to support development and design of customized programs such as textbooks, media aids, film or video, workbooks, study guides, teaching units and papers. Includes records related to programs developed and offered outside school programs by various government departments or private organizations or special programs or events in which students may have the ability to participate.	Originating Department	E + 5 Y	E = Until superseded or obsolete			Curriculum and Programming
EP-02	Planning and Curriculum Guidelines	Includes directives, guidelines and proposals for new curriculum programs. Includes meeting notes and reports, material regarding comparisons with programs in other school boards. Includes program review reports and other valuations of specific programs in the curriculum (e.g. kindergarten, French immersion).	Originating Department	E + 5 Y	E = Until superseded or obsolete	Operational Value		
EP-03	Outline, Courses of Study	Outlines of programs and courses of study aligned with educational initiatives of the Division such as Indigenous Foundations, Safe and Caring Schools, etc.	Schools / Originating Department	E + 7 Y	E = Aug. 31	Operational Value		
EP-04	Library Management / Learning Commons	Includes records related to library / learning commons operations. Records include collection inventories, correspondence, acquisition and disposal planning and strategies, and other records related to library holdings and operations.	Schools / Originating Department	E + 2 Y	E = Aug. 31	Operational Value	PIB	

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
EP-05	Educational Programming	Records on the administration and management of program delivery such as school based supports, school linked supports and regional services. Includes records related to We Day, Orange Shirt, Pink Shirt, nutrition, staff wellness, cooking programs, Try Me Triathlon, etc. Excludes Student Records See SI-06	Student Services	E + 5 Y	E = Aug. 31	Operational Value		
EP-06	Curriculum and Programming - Locally Developed Courses	Includes proposals, correspondence and curriculum development materials.	Originating Department	E + 5 Y	E = Termination of program			Curriculum and Programming – Locally Developed Courses
FA	**Finance and Accounting**	**The function of managing board and school financial and accounting resources. Includes establishing and operating and maintaining accounting (payables, receivables, revenue) systems, controls and procedures, financial planning, reporting, preparing budgets and budget submissions, and the monitoring and analysis of capital assets. Records include but are not limited to accounts payable and receivable, budgets, audits, benefits accounting, expense payments, financial reporting, fixed asset management and all matters regarding the allocation and control of funds.**						
FA-01	Accounts Payable	Includes records documenting funds payable such as legal fees, trustee and employee expense claims, procurement credit card (P-Card) payment, purchase orders, honorariums, vendor transaction listings, payment vouchers, cheque requisitions, gas, hydro and phone bills, petty cash disbursements, and supporting documentation.	Financial Services	E + 7 Y	E = Aug. 31		PIB	Accounting Purchase Orders
FA-02	Accounts Receivable	Includes records related to accounting for money owed to schools and boards. Records include invoices, cash receipts, correspondence, cash lists, and statements of account.	Financial Services	E + 7 Y	E = Aug. 31		PIB	Accounting

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
FA-03	Audits - Financial	Includes records regarding internal and external financial audits of accounts. Also includes records regarding tax audits of Goods and Services Tax (GST) conducted by the Federal Government and other external auditors and internal auditors, such as working papers, audit reports and post-audit correspondence. Excludes Non-financial Audits	Financial Services	E + 10 Y	E = Aug. 31			Auditing
FA-04	Banking and Cash Management	Includes records regarding banking transactions and relationships with banks. Includes bank statements, bank reconciliations, deposit records, cancelled cheques, cheque stubs, investments, and money order rates.	Financial Services	E + 7 Y	E = Aug. 31			Banking and Cash Cheque Administration
FA-05	Budgets	Includes records pertaining to departmental and board budgets, both capital and operating, and supporting documentation. Includes records about practices and procedures, controls, and programs.	Originating Department	E + 7 Y	E = Aug. 31	Operational Value,		Budget – Capital Budget – Information
FA-06	Capital Projects - Financing	Includes records relating to the financing of capital projects. Includes quarterly reports, working papers, building monthly costs, capital payment vouchers, approvals, costing, capital expenditure forecasts and correspondence with architects and contractors.	Financial Services	E + 7 Y	E = Aug. 31 of the year of project's completion.			Budget – Capital
FA-07	Capital Revenue	Includes records related to capital revenue from sale of property and rental income from leased premises and other sources	Financial Services	E + 7 Y	E = Aug. 31 of the year of completion of sale.			
FA-08	Cost Allocations	Includes records relating to allocation of tuition and other costs between school boards / authorities, correspondence, reports and related supporting documentation.	Financial Services	E + 7 Y	E = Aug. 31	Operational Value		
FA-09	Financial Forecasts and Reports	Includes records relating to financial forecasting general ledger (GL) balancing, variance reports, yearly schedule, and variance report changes, financial and economic planning and analysis of various financial issues such as revenue analysis, tax, GST, planning and analysis, and related correspondence.	Financial Services / Schools	E + 7 Y	E = Aug. 31			Budget Reports Reporting – Financial

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
FA-10-01	Financial Statements	Includes records regarding the final, signed, Board approved year-end financial statements and final statements.	Financial Services	Permanent	E = Aug. 31	Archival		Audited Financial Statements Reporting – Financial
FA-10-02	Financial Statements – Working / Backup Documentation	Includes records associated with the development of financial statements.	Financial Services	E + 7 Y	E = Aug. 31			Reporting – Financial
FA-11	Fees	Includes records regarding fee collection and fundraising by schools and / or Division, such as school fees, fee collection, and supporting documentation, reports of outstanding fees sent to collections, letters to parents advising of collection action, and other correspondence. Excludes Agreements and Contracts See LE Series Excludes Funding and Fundraising See FA-12 and FA-13-01	Originating Department	E + 7 Y	E = Student Graduation / Exit from Parkland School Division		PIB	School Fees
FA-12-01	Funding	Includes records related to funding from both government and other sources such as regional collaborative service delivery. Excludes: Agreements and Contracts See LE Series Excludes Fees and Fundraising See FA-11 and FA-13-01	Originating Department	E + 7 Y	E = Aug. 31			
FA-12-02	Funding – Reporting	Includes records related to reporting based on grants and allocations that will require review, audit and / or reporting. Examples include reporting of statistics on use and volunteer support for Breakfast Club, nutrition programming, etc.	Originating Department	E + 7 Y	E = Aug. 31			
FA-13-01	Fundraising	Includes records regarding the raising of funds from school initiatives. Includes banking information, bank reconciliations, correspondence with suppliers and sponsors, pledge forms, invoices, cheque stubs, cheque registers, and documents related to expenditures, such as records of sale or receipts. Examples include Terry Fox Run and Farewell Events for transferring students. Excludes Funding and Fees See FA-11 and FA-12	Originating Department	E + 7 Y	E = Aug. 31			

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
FA-13-02	Fundraising - Charitable Organization Status	Includes records regarding the raising of funds for charity (completed contribution forms, issued receipts, charity return, promotional materials and reports) Excludes Funding and Fees See FA-11 and FA-12	Originating Department	E + 7 Y	E = Aug. 31			
FA-14-01	Inventory Control - Capital Assets	Includes records related to capital assets valued over $5000 that will have depreciating value, including asset listings, depreciation details, asset transfer information, and details of extraordinary entries.	Corporate Supports and Services	E + 10 Y	E = Aug. 31 of year of disposal of asset.			
FA-14-02	Inventory Control - Non-Capital Assets	Includes records related to non-fixed assets valued under $5000, including inventories of Division owned equipment. Excludes hazardous materials SDS sheets See HS-05	Originating Department	E + 7 Y	E = Aug. 31			
FA-14-03	Inventory Control – Video	Includes records of video recordings capturing images of school and division assets submitted to the Centre for Education.	Originating Department	E + 1	E = Until superseded or obsolete			
FA-14-04	Inventory Control – Video	Includes records of video recordings capturing images of school and division assets at time of asset being closed. Submitted to the Centre for Education.	Corporate Supports and Services	E + 7 Y	E = School closure			
FA-15	Investments, Carryovers, and Reserves	Includes records relating to investments, carry overs, and reserves to support school operations and sound financial management, such as obtaining a term deposit.	Financial Services	E + 7 Y	E = Aug. 31 of year investment matures			
FA-16	Journal Vouchers and Journal Entries	Includes completed journal voucher forms, input forms, and all background documentation used to substantiate journal entries.	Financial Services	E + 7 Y	E = Aug. 31			
FA-17-01	General Ledgers	Includes records itemizing the assets, liability, owner's equity, revenue and expense accounts of the Division.	Financial Services	E + 2 Y	E = Dissolution of the Division	Archival		Reporting – Financial
FA-17-02	Subsidiary Ledgers, Registers and Journals	Includes all subsidiary ledgers, registers and journals such as payment and receipt journals, payroll registers, purchase order registers, and year-end adjustments.	Financial Services	E + 7 Y	E = Once superseded or obsolete			

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
FA-18	Enrolment Reporting	Includes all counts and projections documenting enrolments of students in the school system and statistical reports required by Alberta Education as part of the funding process for the preparation of educational statistics.	Financial Services	E + 7 Y	E = Aug. 31	Operational Value		
FA-19	Pension Contributions / Support	Includes contribution cards detailing pension and benefits obligations due to retired employees and other annuity or superannuation plans (TPP). Includes payroll records required to determine and verify pension payments.	Financial Services	E + 7 Y	E = Dec. 31			
FA-20-01	Procurement	Includes records regarding the purchase of goods and services such as purchase requisitions, purchase orders, requests for proposal, requests for quotations, specifications, invitations to tender, proposals, tender submissions, bid and performance bonds, and all documentation regarding the selection process.	Financial Services	E + 10 Y	E = Contract Awarded			Tendering
FA-20-02	Procurement - Cancelled	Includes records regarding the purchase of goods and services such as purchase requisitions, requests for proposal, requests for quotations, specifications, invitations to tender, but the Procurement action was cancelled.	Financial Services	E + 3 months	E = Procurement Action Cancelled			
FA-20-03	Procurement – Unsuccessful Bids	Includes records regarding the purchase of goods and services particularly tender submissions, bid and performance bonds, and all documentation regarding the selection process for unsuccessful bids.	Financial Services	E + 1 Y	E = Contract Awarded			
FA-21	Signing Authorities	Includes records of signing authorities.	Financial Services	E + 7 Y	E = Aug. 31			Signing Authorities
FA-22	Surplus Assets	Includes records related to arrangements for disposal of equipment, furniture, books, etc.	Originating Department	E + 2 Y	E = Action completed to surplus asset			
FA-23	Taxation	Includes records related to federal and provincial tax returns, property and goods and services tax, charity information returns, assessments, receipts, and supporting documentation.	Financial Services	E + 10 Y	E = Aug. 31			Taxation

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
FM	**Facilities Management**	**The function of managing and maintaining board and school authority buildings and facilities and supporting capital initiatives and building improvements. Records include maintenance and operations reports, requests and logs, environmental testing of facilities, equipment maintenance and testing, facilities planning and improvements, capital and non-capital projects, inspection reports, and records relating to property acquisition and disposition, building and office renovations, security, and property management relationships.**						
FM-01	Building and Site Approvals	Includes documentation such as site plan approvals, building permits, and reports pertaining to the approval of building plans by the municipality, Fire Marshal's Office, Ministry of Education, Ministry of Health, Ministry of Infrastructure, and other government bodies.	Facility Services	Permanent	E = Disposal of property or asset	Operational value Legal Value Archival		Buildings Capital – Specific Site Properties
FM-02-01	Inspection and Testing Logs and Reports	Includes all documentation to support the inspection and testing of buildings, equipment, physical plant and property. Records include logs, inspection reports, year-end reports, equipment lists and locations. Includes elevator logs, boilers and pressure systems, sanding and salting logs, certificates of inspection, deficiency lists, inspection sheets, condition analysis and reports. Also includes inspections of major systems, playground equipment inspections logs, chemical treatment log, water quality testing, physical education equipment inspections, technical program equipment, etc. Excludes Emergency power systems inspections and testing, fire extinguisher testing, fire protection systems testing See FM-02-02 Excludes Health and Safety logs and inspection reports See HS-02 Series Excludes Air Quality Reports See HS-08	Facility Services	E + 3 Y	E = Aug. 31 and all deficiencies corrected			
FM-02-02	Inspections Logs and Reports - Fire Protection Systems and Emergency Power Systems	Includes records regarding the inspection and testing of emergency power systems, fire extinguishers, and fire protection systems.	Facility Services	E + 1 Y	E = Aug. 31 and all deficiencies corrected	Operational Value		

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
FM-03	Site Specific Projects	Includes records regarding renovations / restorations and repair to existing board owned facilities, such as reports and studies, inspection and remedial repair work reports, condition survey, design notes, technical specifications, copies of purchase orders, copies of contract documents, progress meetings, and deficiency reports, project review, and final drawings and reports. Excludes original purchase orders See FA-01 Excludes original contract documents See LE Series	Facility Services	Permanent	E = Aug. 31 of year of Disposal of property	Archival		Buildings Construction
FM-04	Infrastructure, Maintenance and Renewal Projects (IMR)	Includes project records regarding building improvements and supporting documents specific to additions, renovations, and alterations to schools and buildings. Records include drawings, project plans, specifications, meeting minutes, project updates, budgets, etc.	Facility Services	E + 10 Y	E = Aug. 31 of year of Disposal of property			Capital – Specific Site Construction
FM-05	Facilities - Capital Projects	Includes records regarding renovations / restorations and repair to existing board owned facilities, such as reports and studies, inspection and remedial repair work reports, condition survey, design notes, technical specifications, copies of purchase orders, copies of contract documents, progress meetings, and deficiency reports, project review, and final drawings and reports. Excludes original purchase orders See FA-01 Excludes original contract documents See LE Series	Facility Services	Permanent	E = Aug. 31 of year of Disposal of property	Archival		Buildings Capital – Specific Site Construction
FM-06	Drawings and Specifications	Includes technical specifications for a project or property e.g. mechanical, electrical and structural. Includes building and fire code requirements and architect's instructions. Includes all drawings and plans of schools and offices, such as master drawings and floor plans, site plans, aerial plans, and plans for additions and alterations.	Facility Services	Permanent	E = Aug. 31 of year of Disposal of property	Archival		
FM-07	Facilities and Capital Planning	Includes records regarding the allocation of classroom and workspace to staff and students. Records include correspondence, proposed student enrolment studies and reports, facilities use plans, facilities designs and layouts, furniture layouts, etc.	Facility Services	E + 3 Y	E = Aug. 31	Operational Value		

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
FM-08	Land Surveys	Includes land survey information such as legal property surveys, construction layout and control surveys, and field notes.	Facility Services	Permanent	E = Disposal of property	Archival		
FM-09-01	Maintenance and Operations – General	Includes records regarding maintenance of Board owned facilities, such as maintenance and repair requirements and arrangements, work orders and schedules. Excludes Fixed Asset maintenance and operations See FM-09-02	Facility Services	E + 2 Y	E = Aug. 31	Operational Value		
FM-09-02	Maintenance and Operations – Buildings, Physical Plant and Equipment	Includes records related to support the maintenance and operations of buildings, physical plant and equipment. Includes office equipment, work orders for fixed assets, and supporting documentation.	Facility Services	E + 2 Y	E = Aug. 31	Operational Value		Buildings Playgrounds
FM-09-03	Maintenance and Operations - Grounds	Includes records related to maintenance such as requisitions, work orders, logs and reports showing action taken re grounds keeping, snow clearance, and cleaning.	Facility Services	E + 2 Y	E = Aug. 31	Operational Value		
FM-09-04	Maintenance and Operations - Pesticides	Includes records related to the use of pesticides including requisitions, work orders, logs and reports on pesticide application.	Facility Services	E + 2 Y	E = Aug. 31			
FM-10	Facility Bookings	Includes records of bookings for the use of school property and facilities by City of Spruce Grove, Town of Stony Plain, and others.	Facility Services	E + 1 Y	E = Aug. 31	Operational Value		
FM-11-01	Physical Security	Includes records regarding the security of office and school facilities and properties, including transportation, such as control of keys, trespassing, surveillance reports, alarm systems, detectors, locks, passes and combinations, sign in and sign out logs, etc.	Originating Department / Facility Services	E + 1 Y	E = Aug. 31	Operational Value	PIB	Security
FM-11-02	Security – Recordings	Includes records regarding video recordings from surveillance cameras used to record incidents or movement. Note: For records related to incidents See HS or LE series	Facility Services	E + 3 mos.	E = Date of Recording	Operational Value	PIB	Security

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
HR	**Human Resources**	**The function of managing all employees within the organization in accordance with policies and procedures. Records include, but are not limited to, personnel records, employee collective agreements, employee information (including medical information), and conditions of work, overtime, salary rates, pensions, benefits, payroll records, grievances, performance evaluations and recruitment.**						
HR-01	Attendance – Employee	Includes records regarding the management of employee attendance, absences (leaves and sabbaticals) and vacations. Records include details about vacation schedules, hours of work, absenteeism reports, and related reports from electronic systems. Excludes Individual employee time management See HR-03-06	Human Resources	E + 10 Y	E = Aug. 31		PIB	Attendance
HR-02	Benefits Administration - General	Includes records regarding the administration of benefits generally, not shown elsewhere in this series. Records may include brochures, rates, quotes, correspondence and explanatory documents regarding benefits offered to employees such as group insurance, dental plans, employee assistance program. Excludes Individual Employee Benefits See HR-03-01	Human Resources and Payroll	E + 2 Y	E = Contract lapses or records are superseded	Operational Value		Benefit Information
HR-03-01	Employee Records	Includes records regarding the employment history of employees related to ongoing management and monitoring.	Human Resources	E + 3 Y	E = Exit from Division		PIB	
HR-03-02	Employee Records – Pension	Includes records regarding the employment history of board employees required for pension. Includes resume and application, benefit enrollment forms, salary calculations, change advice, certification of level placement, probationary contract, and employee verification forms.	Human Resources	E + 70 Y	E = Date of Birth		PIB	
HR-03-03	Employee Records - Health Recovery	Includes records related to disability management and workforce accommodation, along with records related to WCB claims.	Human Resources	E + 5 Y	E = Case closes, return to work and all services provided, or retirement	Operational Value	PIB	Accidents WCB – Individual Records

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
HR-03-04	Employee Records – Payroll	Includes records regarding individual employee payroll information, such as TD1s, log books, direct deposit authorizations, car allowance, phone allowance, and supporting documentation.	Payroll	E + 7 Y	E = Aug. 31		PIB	
HR-03-05	Employee Records – Performance Management	Includes records regarding employees' performance, such as reviews by supervisors, performance development process forms, commendations, disciplinary, performance and non-medical counselling notes, and supporting documentation.	Human Resources	E + 5 Y	E = Aug. 31	Operational Value	PIB	
HR-03-06	Employee Records - Professional Development and Training	Includes records regarding employee training supported by the Division, including conferences and seminars, certifications / accreditation that an employee or a contractor must possess in order to successfully fulfill the position requirements.	Human Resources	E + 3 Y	E = Termination of employment	Operational Value.	PIB	Professional Development
HR-03-07	Employee Records – Timesheets	Includes records of timesheets submitted for payroll processing.	Originating Site	E + 3 Y	E = Aug. 31	Operational Value	PIB	
HR-04	Employee Surveys	Includes surveys and research conducted on Division staff regarding issues and planning that affect them.	Human Resources	E + 3 Y	E = Aug. 31	Operational Value	PIB	
HR-05	Payroll Administration – Time Management	Generated by employee-entered information in Payroll system. Includes records regarding allocation and distribution of labour, such as timesheets, employee attendance records, vacation / lieu time requests, overtime banked, statutory holidays banked, time, relief pay, daily pay sheets, sickness and accident, off/on duty report payroll adjustment, time input forms (overtime paid, stand-by, relief authorizations, car allowance claims, shift change, time sheets, statutory holiday paid) wage paid / holiday advance requests, timesheets and supporting documentation. Excludes Administration of attendance See HR-01	Payroll	E + 7 Y	E = Aug. 31		PIB	Reporting – Payroll – Working Papers and Monthly Reports Reporting – Payroll – Year End
HR-06	Criminal Records / Vulnerable Sector Checks	Includes records listing any criminal code convictions (police clearances) that have not been pardoned for all existing and new employees and service providers that come into direct contact with students on a regular basis.	Human Resources	E + 2 Y	E = Termination of employment	Operational Value	PIB	

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
HR-07	Criminal Offence Declarations	Includes records of offence declarations, signed by the employee / service provider, which lists all criminal code convictions registered since the date of the last offence declaration. Note: Separated from Employee Records to ensure confidentiality.	Human Resources	E + 5 Y	E = Termination of employment	Operational Value	PIB	
HR-08	Staff Listings and Reports	Includes all report listings concerning staff, e.g., staff directories, seniority lists, retirement lists and lists of supply teachers. Excludes Emergency Call Out Lists See HS-06-01	Human Resources	E + 5 Y	E = Until superseded or obsolete	Operational Value	PIB	
HR-09	Job Descriptions and Classification	Includes job descriptions and specifications, as well as background information used in their preparation or amendment.	Human Resources	E + 2 Y	E = Until superseded or obsolete	Operational Value		Classification – Position Descriptions
HR-10-01	Labour Relations - Negotiations and Agreements	Includes records regarding the administration and interpretation of the board's collective agreements and includes seniority lists, implementation plans, records related to collective bargaining, e.g. final offers, memoranda of settlement, mediation, arbitration used in preparation for bargaining. Also includes relationship and contact with management exempt staff associations and supporting documentation.	Human Resources	E + 5 Y	E = Date collective agreement expires		PIB	Collective Bargaining
HR-10-02	Labour Relations - Grievances and Arbitration	Includes records regarding grievances filed by employees, such as evaluation reports, notifications, correspondence with unions concerning grievance initiators, and legal opinions.	Human Resources	E + 5 Y	E = Settlement of the grievance / arbitration, or expiration of the appeal		PIB	Appeals and Grievances
HR-10-03	Labour Relations - Union Certification	Includes original documents concerning the certification of labour unions.	Human Resources	E + 1 Y	E = Until dissolution of the union			

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
HR-11	Pension Administration	Includes records regarding the administration of pensions such as plan documents, deduction registers, and prior service summary reports, records of decisions, annual / tri-annual evaluations, remittances and reconciliations. Also includes records regarding pension policy decisions. Excludes Employee specific pension information See HR-03-02	Payroll	E + 10 Y	E = Final payout of the pension or date pension records are transferred to pension authority (e.g. LAPP or ATRF)			
HR-12	Recruitment and Hiring	Includes records regarding the administration of a specific competition, such as requisitions, advertisements, evaluation criteria, career fairs, and interview guides. Excludes resumes and job applications See HR-13	Human Resources	E + 2 Y	E = Completion of competition	Operational Value		
HR-13	Resumes and Job Applications	Includes records of applications, resumes and applicant evaluations to support recruitment in the division. Excludes resumes of candidates selected to be interviewed. Note: No required retention for unsolicited resumes	Human Resources	E + 3 Y	E = Competition completed or date of receipt of resume / application	Operational Value	PIB	
HR-14	Salary Administration	Includes records regarding the planning and scheduling of salaries, such as job evaluations, job classification systems, salary surveys and schedules, salary increments, service pay and substitution pay.	Human Resources and Payroll	E + 5 Y	E = Until superseded or obsolete	Operational Value		
HR-15	Staff Awards, Recognition and Honours	Includes records relating to special recognition and awards presented to staff.	Corporate Supports and Services	E + 5 Y	E = Aug. 31	Operational Value	PIB	
HR-16	Student Teachers	Includes records related to student teachers completing placements at Division schools, such as application, resume, criminal record check, use of technology agreement, etc.	Human Resources	E + 2 Y	E = Completion of Placement	Operational Value	PIB	
HR-17	Training Program Records	Includes records regarding various internal and external training and education programs offered to employees. Excludes specific employee records pertaining to training See HR-03-05	Human Resources / Originating Department	E + 3 Y	E = Aug. 31	Operational Value.		

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
HR-18	Trustee Management	Includes records relating to Trustees such as identifying information, confidentiality agreement, use of technology, etc.	Human Resources	E + 70 Y or E + 5 after termination whichever is longer	E = Date of Birth or E + 5 Y after Term ends		PIB	
HR-19-01	Volunteer – Guidelines and Administration	Includes records for volunteer program administration including administrative procedure guidance. Excludes volunteer recruitment and recognition See CP-05	Corporate Supports and Services	E + 2 Y	E = Until superseded or obsolete			
HR-19-02	Volunteer Management	Includes records for volunteer management including correspondence, criminal record and vulnerable sector checks, offense declarations, confidentiality agreements, technology use agreements, and drivers' abstracts.	Human Resources	E + 2 Y	E = Volunteer no longer at school site	Operational Value	PIB	Volunteers
HS	**Health and Safety**	**The function of promoting health and safety, and encouraging attitudes and methods that will lead to improved wellness in the division.**						
HS-01	Health and Safety Program	Includes records regarding the development, objectives and administration of the occupational health and safety program, policies, procedures, guidelines, hazard assessments and hazard notification forms, roles and responsibilities, procedures for worksite inspections, health and safety orientation and training, incident investigations, worker participation and engagement, health and safety committees, compliance, and statistics.	Facility Services / Originating Department	E + 3 Y	E = Aug. 31	Operational Value		
HS-02-01	Health and Safety Program - Audits	Includes records regarding internal and external health and safety program audits as part of the Partners in Injury Reduction Program. Includes activities to rectify identified deficiencies and follow up on recommendations for improvement. Audits are performed annually.	Originating Department / Facility Services	E + 3 Y	E = Aug. 31 of year of audit and all deficiencies corrected		PIB	
HS-02-02	Health and Safety Program – Inspections	Includes records of inspections carried out in accordance with the Occupational Health and Safety Act, Fire Code, and division requirements.	Facility Services	E + 3 Y	E = Aug. 31 of year of inspection and all deficiencies corrected		PIB	

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
HS-03	Health and Safety - Committee	Includes agendas, minutes, terms of reference, supporting documentation, and orientation and training records for the Committee.	Facility Services	E + 3 Y	E = Aug. 31		PIB	
HS-04 – 01	Health and Safety Accident Report and First Aid Records – Staff	Includes completed Accident Report and First Aid Record forms for staff along with any incident investigations. Note: Depending on the nature of the incident, records may be added to Legal LE-01 Excludes Individual employee medical health records (personally identifiable records) See Human Resources	Human Resources	E + 3 Y	E = Aug. 31 of year of incident and all deficiencies / issues closed or corrected		PIB	Accidents
HS-04 -02	Health and Safety Accident Report and First Aid Records – Students	Includes completed Accident Report and First Aid Record forms for students along with any incident investigations. Note: Depending on the nature of the incident, records may be added to Legal LE-01 Excludes Individual student medical health records (personally identifiable records) See SI series	Corporate Supports and Services	E + 3 Y	E = Aug. 31 of year of incident and all deficiencies / issues closed or corrected		PIB	Accidents
HS-05	Safety Data Sheets	Includes Safety Data Sheets as created and issued by the manufacturer. Note: Safety data sheets are not records of the board, however every location that uses the material must have access to a data sheet, as required by OH&S Act.	Facility Services	E = 0	E = Until superseded or obsolete	Operational Value		
HS-06-01	Disaster and Emergency Planning	Includes records regarding emergency preparedness and response including plans to support the Division and schools in case of fire, lockdown, or other emergencies. i.e. business continuity plans, call lists, supplier / vendor contacts, and related reports.	Schools / Facility Services / Transportation Services	E = 0	E = Until superseded or obsolete		PIB	Disaster and Emergency Planning
HS-06-02	Visitor – Sign in and out Register	Includes visitor logs documenting visitors to school and Centre for Education during and after hours. Visitors may include Division staff, students, volunteers, contractors, and parents / guardians.	Schools / Centre for Education	E + 1 Y	E = Aug. 31	Operational Value	PIB	

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
HS-07	Designated Substances and Hazardous Materials Management	Includes records related to the inventory, monitoring, management and disposal of chemical, biological, physical agents or substances.	Schools	E + 1 Y	E = Aug. 31			
HS-08	Air Quality, Asbestos / Mold - Removal and Containment	Includes records regarding renovation or removal projects on jurisdiction owned facilities containing asbestos/mold. Records include clearance documentation, regarding the removal of asbestos, air quality testing, asbestos removal consulting and removal report, asbestos audit testing, industrial waste receipt and supporting documentation.	Facility Services	E + 12 Y	E = Disposal of property			
IM	**Information Management**	**The function of applying and managing information and communications technology to support the business needs of the organization to capture, store, retrieve, transfer, communicate and disseminate information. Includes planning, determining requirements, developing, acquiring, modifying and evaluating information and systems to house information such as applications and databases. Also includes the systematic management of information and the appropriate decommission of systems and disposition of information**						
IM-01	Archives Administration	Includes records regarding schools and service units that have transferred records to the Archives; archival donations from external sources; and artifacts and cultural properties from the Board of Trustee's Office. Documentation includes information regarding the records received, accession and de-accession records / registers, organizational updates, box contents listings, donor forms, and supporting documentation.	Records Management	Permanent	E = Until superseded or obsolete	Archival	PIB	

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
IM-02-01	Records Management - Administration	Includes records regarding the development, maintenance, and updating of records management program system documentation. Includes records regarding the administration of the records management system such as inventories, lists, vendor information, and supporting documentation. Excludes Records Management Disposition Authorizations See IM-02-03 Excludes Records Management Retention Schedules See IM-02-04	Records Management	E + 5 Y	E = Until superseded or obsolete .	Operational Value		Records Management – General
IM-02-02	Records Management – Transfer and Retrieval	Includes records regarding the transfer of custody and control of records from service units and schools to the records management system or to other jurisdictions. Records include transmittals, requests for retrieval / return of records. Also includes student request / authorization and supporting documentation.	Records Management	Permanent	E = Upon transfer / retrieval	Archival	PIB	Records Management – Retention and Inventories Records Management - Projects
IM-02-03	Records Management – Disposition Authorization	Includes records regarding authorization of records disposition, as well as requests to suspend disposition (holds). Includes disposition forms and accompanying transmittals, hold authorizations, and supporting documentation.	Records Management	Permanent	E = Aug. 31	Archival	PIB	
IM-02-04	Records Management – Records Retention	Includes records of all versions of approved records retention schedules and file plans.	Records Management	Permanent	E = Until superseded or obsolete	Archival		Records Management – Retention and Inventories
IM-03-01	Freedom of Information and Protection of Privacy (FOIP) – Requests and Replies	Includes records regarding requests for information under provincial legislation, such as applications, correspondence and copies of material released	Corporate Supports and Services	E + 5 Y	E = Once request is closed	Operational Value	PIB	
IM-03-02	Freedom of Information and Protection of Privacy (FOIP) – Personal Information Banks	Includes records regarding directories of Personal Information Banks (PIBs) and supporting documentation. A Personal Information Bank lists the type of personal information held by a public body.	Corporate Supports and Services	E + 1 Y	E = Until superseded or obsolete	Operational Value	PIB	
IM-03-03	Disclosure of Personal Information under FOIP Act	Includes records documenting disclosures of personal information to authorized personnel i.e. social workers, law officials, etc.	Human Resources / Corporate Supports and Services	E + 1 Y	E = Disclosure completed			

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
IM-03-04	Freedom of Information and Protection of Privacy (FOIP) - Privacy Impact Assessments (PIA's)	Includes records of privacy impact assessments (PIA) and related documentation.	Corporate Supports and Services	E + 3 Y	E = Until superseded or obsolete	Operational Value		
IM-03-05	Freedom of Information and Protection of Privacy (FOIP) – Investigations	Includes records of privacy breaches or investigation related to the application of the Act.	Legal	E + 7 Y	E = Once final report is completed	Operational Value	PIB	
IM-04-01	Access Control and Password Records	Includes records related to the management of student accounts and Division applications. Includes individual access, password management, etc.	Information Technology Services	E = 0	E = Aug. 31	Operational Value		
IM-04-02	Data Administration	Includes records on data administration and documentation related to the management of electronic records such as data systems specifications, metadata, audit trails, migration, data models, table and dependency descriptions, taxonomies, etc. Data administration includes records that are needed to explain the meaning, purpose, logical relationships, use and origin of data.	Originating Department	E + 3 Y	E = Until data set is decommissioned	Operational Value		
IM-04-03	Research and Statistical Analysis	Includes records of research papers and background data and analysis relevant to the Division. Also includes records regarding the analysis of data, such as reports, opinions, position papers, studies, and supporting documentation.	Originating Department	E + 5 Y	E = Research complete	Operational Value,		
IM-05-01	Information Systems - Architecture	Includes records relating to the design of computer systems and / or software, including needs assessments, business cases, project charter, process flowchart documentation, impact analysis, user and system requirements, specifications, testing plans and results, user sign-offs, project management meeting minutes / documentation, and system development documentation. Also includes records on system installations / conversions and product evaluations. May also include requests for modifications and upgrades.	Information Technology Services	E + 2 Y	E = Aug. 31	Operational Value		
IM-06-01	Information Technology – Backups	Backups are considered transitory records unless required in the event of a disaster or for data recovery.	Information Technology Services	E + 6 months	E = Date	Operational Value		

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
IM-06-02	Information Technology - Helpdesk	Includes records regarding the performance of helpdesk function and call centre service management systems. Records include helpdesk requests and tickets, background documentation submitted by the user, scripts used by the helpdesk to respond to inquiries, support for system maintenance, upgrades, problem resolution, change requests, etc.	Information Technology Services	E + 5 Y	E = Ticket resolved	Operational Value		
IM-06-03	Information Technology – Functional, Technical Specifications	Includes records regarding systems development, functional and technical specifications and requirements, such as background requests, studies, surveys, stakeholder engagement information and business cases used to design / develop software / hardware specifications. Also includes acceptance / compatibility criteria, modeling, final specifications and supporting documentation.	Information Technology Services	E + 3 Y	E = Life of System	Operational Value		
IM-06-04	Information Technology - Information Security	Includes records pertaining to the protection of information and information systems from unauthorized access, use, infection from viruses, disclosure, disruption, modification, perusal, inspection, recording or destruction in accordance with confidentiality, integrity and availability requirements. Excludes physical security See FM-11-01	Information Technology Services	E + 1 Y	E = Until superseded or obsolete	Operational Value		
IM-06-05	Information Technology – Installation and Implementation	Includes records regarding system installation / implementation, such as data conversion plans, agreements with third parties, mapping information, and implementation plans.	Information Technology Services	E + 1 Y	E = Life of System	Operational Value		
IM-06-06	Information Technology – Plan	Includes records regarding the comprehensive framework used to manage and align an organization's Information Technology (IT) assets, operations, and projects with its operational characteristics, defining how information technology will support the division's operations.	Information Technology Services	E + 5 Y	E = Aug. 31	Operational Value		
IM-06-07	Information Technology – System, Server, Network Monitoring	Includes records regarding the management and monitoring of system / server network environment, such as performance statistics, configurations, performance benchmarks, job scheduling, installations, etc.	Information Technology Services	E + 1 Y	E = Aug. 31	Operational Value		

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
IM-07	Telecommunications Systems	Includes records relating to the management, maintenance and use of telecommunications including landline and wireless mobile devices and equipment. Includes system documentation, configuration details and services provided.	Information Technology Services	E + 3 Y	E = Aug. 31	Operational Value		Telecommunications
IM-08-01	Web Administration – Web Management	Includes Web site management and operations records that provide context related to the site such as administrative and technical records necessary for or produced during the management of a Web site.	Communications	E + 3 Y	E = Until superseded or obsolete	Operational Value		
IM-08-02	Web Administration – Web Structure	Includes records that provide structure to the Web site including site maps that show the directory structure into which content pages are organized, software configurations used to operate the site and establish its look and feel including server environment configurations and specifications and supporting documentation.	Communications	E + 3 Y	E = Life of Web site	Operational Value		
IM-08-03	Web Administration – Web Content	Includes records regarding Web content records such as the content pages that compose the site, inclusive of HTML markup, records generated when a user interacts with a site, lists of the URLs referenced by the site's hyperlinks and supporting documentation. Documents posted on Web sites are for publication only and are considered transitory.	Communications	E + 1 Y	E = Until superseded or obsolete	Operational Value	PIB	
IM-09	Disaster Recovery and Business Continuity Planning	Records related to planning and preparing for a disaster including business impact analysis, disaster recovery plans, and business continuity plans.	Information Technology Services	E + 5 Y	E = Until superseded or obsolete	Operational Value		
LE	Legal	The function of addressing legal issues relating to the operations of the board and schools. Records include, but are not limited to, claims and litigation files, appeals and hearings, contracts and agreements entered into on behalf of the board and schools, deeds and titles relating to properties, harassments incidents, etc.						

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
LE-01	Accident / Incident Reports	Includes reports related to student / employee accidents that occur on board and school authority property, schools and the administration offices or on school trips. Records include communications, investigations, reports, administration of first aid and action taken as a result of the accident. Excludes claims / litigations, WCB claims / reports See LE-04	Corporate Supports and Services / Human Resources	E + 10 Y	E = Last action taken that advances claim.		PIB	Accidents Students - Accidents
LE-02	Appeals / Hearings – Students	Includes records from appeals related to disciplinary action or appeals related to student concerns.	Deputy Superintendent	E + 2 Y	E = Aug. 31		PIB	
LE-03	Appeals / Hearings	Includes records of hearings conducted with regard to issues that affect schools or the division. Records include correspondence, reports, discovery findings, hearing proceedings and final decisions.	Corporate Supports and Services	E + 10 Y	E = Last action taken that advances claim		PIB	
LE-04	Claims / Litigation	Includes all liability claims and litigation against or entered into by the division and schools. Records include reports, correspondence, investigations, WCB claims, etc.	Corporate Supports and Services / Human Resources	E + 10 Y	E = Last action taken that advances claim		PIB	
LE-05-01	Contracts and Agreements - General	Correspondence and information related to processes for contracts and agreements including process information to support decision making e.g. Contract Approval Form.	Corporate Supports and Services	E + 5 Y	E = Until superseded or obsolete		PIB	Agreements Contracts and Agreements – Capital Contracts and Agreements – General
LE-05-02	Contracts and Agreements	Correspondence and information related to contracts and agreements including required documentation such as Contract Approval Form.	Corporate Supports and Services	E + 5 Y	E = Until superseded or obsolete		PIB	Agreements Contracts and Agreements – Capital Contracts and Agreements – General
LE-05-03	Contracts and Agreements - Employee	Includes records regarding employee related contracts, such as employment contracts, retirement agreements, etc. which may also contain memos and affidavits of execution and supporting documentation.	Human Resources	E + 10 Y	E = Contract expires and all conditions met		PIB	Agreements

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
LE-05-04	Contracts and Agreements – Educational	Includes records regarding educational related agreements, such as cooperative education agreements, work experience agreements. Excludes agreements related to employment See LE-05-02 Excludes agreements related to land See LE-10 series	Corporate Supports and Services	E + 10 Y	E = Contract expires and all conditions met		PIB	Agreements
LE-06	Deeds and Titles	Includes original deeds to division owned property.	Corporate Supports and Services	Permanent	E = Disposal of property	Archival		Agreements
LE-07	Insurance Policies	Includes records regarding liability insurance policies held by division such as insurance certificates / policy documents and supporting documentation. Also includes records relating to policies to cover loss or damage to property or premises and cover staff and general public against injury or death resulting from accidents on school/ board premises or occurring during employment. Excludes insurance claims and accident reports See LE-04	Corporate Supports and Services	E + 2 Y	E = Expiry Date of Policy			
LE-08	Legal Opinions / Precedents	Includes records relating to legal opinions and precedents about legal issues identified by the schools / division. Records include case law, correspondence, reports, and findings / opinions.	Corporate Supports and Services	E + 5 Y	E = Until superseded or obsolete	Operational value		
LE-09	Policing Arrangements	Includes correspondence between schools and police departments regarding extra duty officers, police visits to schools, and related items.	Originating Department	E + 2 Y	E = Aug. 31	Operational value		
LE-10-01	Property - Acquisition and Sale	Includes land purchase agreements, development agreements, property appraisals, valuations and quotes concerning land owned by the board and school authority or under consideration for purchase. Also includes plans, correspondence, reports and backup documentation relating to the acquisition or sale of lands.	Corporate Supports and Services / Facilities	Permanent	E = Disposal of property.	Archival		

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
LE-10-02	Property - Occupancy	Includes records regarding lease and rental agreements and contracts for land, buildings or property, residential or commercial, by and to the board, such as signed leases, surveys, tenant information, schedules and receipts of payment and supporting documentation e.g. space for out of school care and play schools.	Facility Services	E + 10 Y	E = Expiry date of contract / agreement and all conditions met		PIB	
LE-11	Property Damage / Trespassing Reports	Includes reports and general correspondence regarding property damage, theft or loss. Also includes vandalism reports, copies of repair invoices, monthly and annual summaries.	Facility Services / Corporate Supports and Services	E + 12 Y	E= Claim resolved and all appeals complete		PIB	
LE-12	Spam Compliance	Includes records to support compliance with Anti-spam legislation and in particular, commercial electronic message policies and procedures, unsubscribe requests and actions, evidence of consent, commercial electronic message recipient consent logs, commercial electronic message scripts, and action taken on unsubscribe requests. Note: Record of consent must be kept as long as contact may continue.	Communications	E + 3 Y	E = Date of request, complaint, or investigation with action taken	Operational value		
LE-13	Incidents - Discrimination and Harassment	Includes records of incidents involving staff and students, incident reports, investigations, and correspondence regarding these issues. Excludes appeals / hearings See LE-03	Human Resources / Corporate Supports and Services	E + 10 Y	E = Aug. 31 of report and all actions concluded.		PIB	
CO	**Communication**	**The function of promoting and marketing board and school programs and services. Records in this function include board and school communication and press releases, speeches, Web sites, public relations activities, events and news releases; materials relating to marketing research, publications and reports.**						
CO-01	Advertisements	Includes publications, artwork and advertisements of the Division or schools. Excludes advertisements for job postings See HR-12	Communications	E + 2 Y	E = Aug. 31	Operational Value		

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
CO-02	Appreciation and Commendation	Includes general commendations, certificates of appreciation and petitions received from the public and parents. Excludes records relating to specific employees or Student Records See HR and SI series	Originating Department	E + 1 Y	E = Aug. 31	Operational Value		Appreciation, Complaints and Inquiries
CO-03	Communiqués	Includes memos, brochures, correspondence and related information about programs and activities sponsored by the Division or by schools such as the Community Report and Assurance Reports.	Communications	E + 2 Y	E = Aug. 31	Operational Value		
CO-04	Consulting and Advisory Services	Includes records related to communication services provided to schools and departments within the Division including guidance on the Style Guide and strategies for effective communication.	Communications	E + 1 Y	E = Aug. 31	Operational Value		
CO-05	Consultation and Engagement	Includes records from consultation with stakeholders for educational planning, consultation on school activities with content collected through applications such as Thought Exchange.	Communications	E + 5 Y	E = Project ends or closes	Operational Value	PIB	
CO-06	Memos, Special Events, Presentations, Ceremonies and Celebrations	Includes speeches, memos, notices, correspondence with parents and others, programs and all related materials pertinent to events sponsored by the board or by schools (e.g. parents' night, school opening ceremonies, reunions, community engagement etc.). Records include program schedules, correspondence, brochures, and event activity details.	Communications	Permanent	E = Aug. 31	Operational value Archival	PIB	Board Operations
CO-07	Media Kits, Communications and News Releases	Includes records regarding board relations with the various media. Includes press releases, marketing and information releases, speeches, photographs, correspondence, etc. Content is frequently posted to Web site.	Communications	E + 1 Y	E = Aug. 31	Operational Value		Public Relations
CO-08	Memorabilia and Branding	Includes school / board memorabilia, collectibles and other historical items that reflect the individual nature of the schools, such as informal school / board and school authority histories, logos and crests, songs, etc.	Schools / Originating Department	Permanent	E = Aug. 31	Operational Value Archival		

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
CO-09	Publications	Includes records for publications such as yearbooks, handbooks, marketing materials, calendars, annual reports, brochures, newsletters, and other promotional materials. Content is frequently made available on Web site.	Originating Department	Permanent	E = Aug. 31	Operational Value Archival	PIB	Publications and Manual Development - PSD
CO-10	Communications Projects	Information that is prepared by communications on behalf of the Division such as school openings, school closures, videos about school activities.	Originating Department	Permanent	E = Aug. 31	Operational Value Archival		Board Operations Public Relations
CO-11	School Handbook	Includes records related to the School Handbook that provides students and parents with guidelines, processes and rules for attendance and instruction.	Schools	E + 5 Y	E = Aug. 31			
RP	**Research and Planning**	**The function of undertaking research and planning to support the ongoing operations of the school and board. Records include but are not limited to research surveys, studies and reports which address issues such as school boundaries, student demographics, municipal planning and statistics used to support Ministry funding requests.**						
RP-01	Research and Planning - School Enrolments	Includes records regarding planning and development issues within the municipality that may have implications on enrolments within the school system. Includes subdivision plans, official plan amendments, population reports, and traffic studies.	Superintendent's Office	Permanent	E = Aug. 31	Operational Value Archival		Students – General
RP-02	Research and Planning - Student Demographics	Includes aggregate reports profiling the characteristics of the student population, such as age, grade, promotion, and country of birth, religion, and other trend data.	Superintendent's Office	Permanent	E = Aug. 31	Operational Value Archival		Reporting - PSD
RP-03	Research and Planning - School Boundaries	Includes information relevant to the establishment of school boundaries for purposes of enrolment and facility use. Includes boundary descriptions, school attendance areas and maps.	Superintendent's Office	E + 10 Y	E = Until superseded or obsolete	Operational Value		School Operations – Boundaries

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
RP-04	Research and Planning - School System	Includes records relating to internal and external research and monitoring of trends and patterns. Records include applications, surveys and research reports undertaken to capture information about school system issues, student evaluation and scoring systems and student backgrounds, school and career selection, external research, applications, surveys and research reports.	Superintendent's Office / Associate Superintendent	Permanent	E = Until superseded or obsolete	Operational Value Archival		
RP-05	Research and Planning – External Requests	Includes external applications to conduct research from sources such as universities, graduate students, and foundations, and their final reports.	Originating Department	E + 1 Y	E = Aug. 31	Operational Value		
RP-06	Research and Planning - Educational and Curriculum Planning	Includes strategic and operational planning documents, and mandates, related correspondence, background and reference information, records of any research conducted into curriculum or program development, such as questionnaires, interest surveys and independent research studies.	Originating Department	Permanent	E = Aug. 31	Operational Value Archival		
SI	**Student Information**	**The function of providing students with programs and services in accordance with the Education Act. Records cover such areas as admissions, transfers and withdrawals, Student Records, guidance and counseling, assessments, and consent / permission forms for special activities and programs.**						
SI-01-01	Bursaries, Awards and Scholarships	Includes records for bursaries, awards and scholarships presented to students such as Citizenship Scholarship Program. Financial records regarding awards retained in appropriate record series in Finance See FA series	Schools / Superintendent's Office	E + 7 Y	E = Aug. 31	Operational Value,	PIB	Awards and Honours – Outside Agencies Awards and Honours within PSD
SI-01-02	Bursaries and Awards – Donors	Includes records regarding donors for Division bursaries and awards such as funding information and financial criteria established by donor.	Schools / Superintendent's Office	E + 5 Y	E = Funds expended		PIB	Donations and Bequests
SI-02-01	Preliminary Assessment / Accommodation	Includes records used prior to a formal assessment, if required. Records may include anecdotal notes, accommodations and interventions used prior to formal assessments and supporting documentation.	Schools	E + 1 Y	E = Aug. 31	Operational Value	PIB	Students – Assessments

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
SI-02-02	Assessments – Testing Instruments	Includes records of testing instruments used by teachers and other staff to assess reading (F & P) and numeracy levels for students. Note : Results are added to the Student Record SI-06	Schools	E + 1 Y	E = Once student leaves the school			
SI-03-01	Case Files - Counseling	Includes case files of students who are referred for counseling. Records include referrals, reports, and case notes, authorization for services, student self-assessment and goal setting, counseling working documents, and supporting documentation. Not to be kept as part of the Student Record SI-06	Schools / Originating Department	E + 1 Y	E = Once student leaves the school		PIB	Counselling and Program Issues
SI-03-02	Case Files – Family Supports	Includes case files for students and their families accessing counselling and other supports such as the Sunrise Support programming. Records may include notes, authorizations, supporting documentation. Not to be kept as part of the Student Record SI-06	Community Support Workers / Family Support Workers	E + 1 Y	E = Once student leaves the school		PIB	Counselling and Program Issues
SI-04	Specialized Assessment - Working Notes	Includes case files for students referred for a specialized assessment which may include, but is not limited to, psychological, learning, speech language, occupational, physical therapy, vision, hearing assessments, testing protocols, authorizations and supporting documentation. Note; Final reports resulting from assessments are placed in the Student Record SI-06	Schools / Originating Department	E + 25 Y	E = Date of Birth	Operational Value	PIB	
SI-05	Student Transfer Administration	Includes requests for transferring of Student Record. Request from another school is added to Student Record for out of province requests.	Schools	E + 7 Y	E= School year transfer date		PIB	

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
SI-06-01	Student Records	Includes all information affecting the decisions made about the education of a student. Includes records specified in the Student Record Regulation. This is a provincial record that may be transferred to another board within Alberta as per the Student Record Regulation. If the student leaves the province the records is copied and the copy set is transferred out of province.	Schools	E + 7 Y	E = Date of Graduation / Exit / Withdrawal		PIB	Student Attendance Student Records
Si-06-02	Student Records – Discipline	Includes records for students related to discipline, particularly school suspension or expulsion that provide notification to parents of action taken. Commonly referred to as direction letters. Considered part of the Student Record mandated by the Student Record Regulation.	Schools / Deputy Superintendent	E + 3 Y	E = Aug.31		PIB	Students – Suspensions / Expulsions
SI-07	Students – Educational Programming	Includes records for programs provided for students such as the Registered Apprenticeship Program (RAP), Marantha Christian Program, work experience, languages, cultural programs, etc. Includes records related to student consent to participate in a program or service. Excludes Educational program administration and planning documents See EP Series.	Schools / Originating Department	E + 3 Y	E = Once student leaves the school		PIB	
SI-08-01	Student Activity Administration	Includes records regarding the administration of student exchanges, occasional or off-site activity, field trips and arrangements for special events related to specific activities, such as concerts, festivals, track meets, facility tours, tournaments, art or essay contests, and science fairs. Records include identification of educational outcomes, activity request, checklists, plans, schedules, etc. Excludes Consent forms See SI-08-02	Schools	E + 3 Y	E = Aug. 31			

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
SI-08-02	Student Activity Participation	Includes requests, consent / permission forms, acknowledgement of risk, correspondence and reports regarding school field trips, occasional or on and off-site activities, consent for working in school laboratories (labs) such as science labs. Also includes reports relating to students involved in student exchanges. Records related to incidents occurring during an activity are added to Legal See LE-01	Schools	E + 2 Y	E = Aug. 31		PIB	
SI-09-01	Student Enrolment and Attendance	Includes registers and reports concerning the enrolment / attendance of students, recording of daily attendance, and daily absence reports. Includes course enrollment, course selection, and withdrawal forms.	Schools	E + 2 Y	E = Aug. 31	Operational Value	PIB	Attendance School Registers
SI-09-02	Student Enrolment Reporting	Includes records from school enrolments generated for reporting purposes.	Financial Services	E + 7 Y	E = Aug. 31	Operational Value		
SI-09-03	Student Enrolment – Residency Verification	Includes records submitted to verify residential address as required for registration for cross boundary schools such as utility bill, identification, rental agreement, proof of title, etc.	Schools	E + 1 Y	E = Aug. 31	Operational Value	PIB	
SI-10	Student Marks	Includes information on students' courses completed, marks received and mark verification sheets, and teacher mark books. Also includes electronic records. Excludes report cards See Student Record SI-06	Schools	E + 2 Y	E = Verification in PowerSchool		PIB	
SI-11-01	Student Medical	Includes records for the administration of medication or personal care services for students including service request, management plans, consent forms and emergency plans. Note: Parent / student may add medical information into the Student Record SI-06	Schools	E + 2 Y	E = Aug. 31		PIB	
SI-11-02	Service / Therapy Dogs	Includes records related to the provision of service and therapy animals such as application, supporting documentation, and accommodation plans.	Schools	E + 1 Y	E = Once student leaves the school			

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
SI-12	Returning Students	Includes records for students who return after graduation or absence such as student appraisals, marks, attendance register, and other student-centered records for continuing education courses. Note: Content may be added to prior Student Record SI-06	Schools	E + 7 Y	E = Date of Graduation / Exit of Student		PIB	
SI-13	Summer School	Includes records from attendance at summer school including registration, marks, grades, summary of school enrolments, and generated enrolment reports.	Connections for Learning	E + 7 Y	E = Classes end			
SI-14-01	Early Learning Program Admission	Includes records for admission to Early Learning, an Early Childhood Development program. Records may include applications for admission, correspondence with clinicians and practitioners, referrals and supporting documentation. Excludes Student Records content for individual students See SI-06	Early Childhood Services	E + 7 Y	E = Program Acceptance		PIB	
SI-14-02	Play Partners Program Rejected Applicants	Includes records for program admission to Play Partners Program, an early Childhood Development program. Records may include applications for admission and supporting documentation. These records are for applicants who were not accepted or withdrew their application.	Early Childhood Services	E + 1 Y	E = Aug. 31		PIB	
SI-14-03	Play Partners Program Waiting List	Includes wait list applications for the Play Partners Program seeking program admission. Records may include applications for admission and supporting documents, such as assessments.	Early Childhood Services	E + 1 Y	E = Aug. 31		PIB	
SI-15-01	Students – Discipline	Includes records, often anecdotal, regarding student behavior observations, tracking and reporting. Includes behavior contracts, correspondence with parents to seek resolution, etc. Note: Not formal notifications of discipline See SI-06-02	Schools	E + 1 Y	E = Once student leaves the school			

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
SI-15-02	Students – Intervention Services	Includes records related to the provision of child intervention services such as record of reporting, disclosure and contact notes.	Schools	E + 10 Y	E = Aug. 31 of year of report		PIB	
SI-15-03	Students – Protocols / Intervention Plan	Includes records related to the Intervention Plan.	Student Services	E + 5 Y	E = Until superseded or obsolete		PIB	
SI-15-04	Students – Risk Assessments	Includes records related to critical incidents documented by staff including assault, allegations of abuse, or allegations of sexual assault. Records include an analysis of risk and potential harm with content included in Violence Threat Risk Assessment (VTRA). Note: VTRA report is added to SI-06	Schools	E + 7 Y	E = Date of Graduation / Exit / Withdrawal		PIB	Students – Risk Assessments
SI-16	Students – Seclusion and Restraint	Includes records related to planning and implementation of actions to address behavior and safety issues such as implementation of physical restraint and seclusion including the Critical Incident Report form submitted from schools.	Student Services	E + 1 Y	E = Once student leaves the school		PIB	
SI-17	Out of School Care	Includes records from out of school care (daycare) programming provided from school sites within the Division	Schools	E + 7 Y	E = Date of Exit from Programming		PIB	
SI-18-01	International Students	Includes records pertaining to out of country students applying to attend schools. Records may include applications for admission, International Student Agreement, correspondence between the student's family and the International Bureau (Global Learning). May include *copies* of Government of Canada Embassy information, Visa student permits, banking information and educational reporting while student in attendance at a school. Excludes content added to Student Record See SI-06	Student Services	E + 27 Y or E + 7 Y	E = Date of Birth or E = Graduation / Exit for short term students	Operational Value,	PIB	

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
SI-18-02	International Students - Hosting	Includes correspondence and records of international hosting programs including documentation on host families, police clearances for host families, Host Family Agreement, minutes of meetings for agent information and supporting documentation to pursue opportunities to bring international students to schools.	Student Services	E + 7 Y	E = Termination of host family relationship	Operational Value,	PIB	
TR	**Transportation**	**The function of providing students with transportation.**						
TR-01	Bus Drivers	Includes records primarily for staff bus drivers including driver licensing, authorization to drive Division owned vehicles, abstracts, training, certifications, route or bus applications, hours of service training and log books, and medicals.	Transportation Services	E + 5 Y	E = No longer employed at Division driving bus		PIB	
TR-02	Bus Drivers – Conduct	Includes records related to complaints about drivers and their conduct.	Transportation Services	E + 5 Y	E = Aug. 31			
TR-03	Bus Drivers – Hazard Assessment	Includes records of annual hazard assessment conducted by drivers regarding their route. Submitted to Government of Alberta.	Transportation Services	E + 7 Y	E = Aug. 31			
TR-04	Bus Drivers - Logs	Includes records of daily logs.	Transportation Services	E + 6 months	E = Aug. 31			
TR-05	Bus Incident Reporting	Includes records related to bus incidents such as a complaint, incident or situation report. Records include complaints, staff reports, information gathering, investigation notes, reports, etc. related to traffic infractions, near miss incidents, route deviation, unapproved stops, or driving infractions. Excludes Student Misconduct See TR-21 Excludes Accident Reports See HS-04 Excludes Accident and Incident Claims See LE-01	Transportation Services	E + 2 Y	E = Date of event	Operational Value		
TR-06	Bus Monitoring	Includes records related to monitoring bus safety at school loading locations and school transfer points such as Greystone, Copper Haven, Memorial Composite. Records include procedures and content on safety.	Transportation Services	E + 2 Y	E = Aug. 31	Operational Value		

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
TR-07	Bus Monitors	Includes records related to bus monitors who support student safety at bus transfer points such as applications, oath of confidentiality, training certification, appropriate use of technology, consents, etc.	Human Resources	E + 2 Y	E = Bus Monitor's role ends	Operational Value		
TR-08	Bus Safety	Includes records related to division activities to support school bus safety such as seat belts, safe operations, site evaluations, and development of procedures and practices for school bus safety.	Transportation Services	E + 5 Y	E = Aug. 31	Operational Value		
TR-09	Bus Safety Training	Includes records developed for training students on the safe use of school bus and bus transportation.	Transportation Services	E + 2 Y	E = Until superseded or obsolete	Operational Value		
TR-10	Communication Logs	Includes records related to communication logs which identify phone calls and emails related to transportation such as queries, comments, observations, complaints, address changes, etc.	Transportation Services	E + 1 Y	E = Aug. 31	Operational Value	PIB	
TR-11	Communication Logs – Recordings	Includes audio recordings of phone logs retained for performance monitoring and quality control.	Transportation Services	E + 6 months	E = Date	Operational Value		
TR-12	Complaints and Appeals	Includes records concerning grievances and documentation of complaints or appeals to request Student Transportation, yard service appeals, school bus stop complaints, etc. Excludes staff grievances See HR-10-02	Transportation Services	E + 3 Y	E = Complaint / Appeal resolved and decision communicated to complainant	Operational Value	PIB	
TR-13	Dispatch Communications	Includes records related to student absences, delays, students not riding allocated bus transportation, etc.	Transportation Services	E + 1 month	E = Last day of the month	Operational Value	PIB	
TR-14	Driver Training	Includes records for driver training aligned with industry and division requirements. Excludes records for individual drivers see TR-01	Transportation Services	E + 5 Y	E = Until superseded or obsolete		PIB	
TR-15	Grants	Includes transportation grant applications and supporting documentation.	Transportation Services / Financial Services	E + 7 Y	E = Aug. 31			

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
TR-16	Operating Regulations Handbook for Drivers	Includes records related to the handbook for bus operations required to be followed for all drivers.	Transportation Services	E = 0	E = Aug. 31			
TR-17	Routes	Includes route maps, ECS routes, extra service runs, temporary alternate routes, route optimization, bus passenger lists, route maintenance requests, notification of route deviation or emergency.	Transportation Services	E + 7 Y	E = Aug. 31	Operational Value	PIB	Transportation – General
TR-18	Security – Recordings	Includes video capture of activities inside the bus, or exterior vehicle monitoring.	Transportation Services	E + 1 month	E = Date of recording	Operational Value	PIB	
TR-19	Special Needs Handbooks	Includes records related to the Special Needs Handbook identifying processes for specialized transportation of students.	Transportation Services	E + 2 Y	E = Until superseded or obsolete			
TR-20	Student Bus Services	Includes records concerning transportation / busing for transportation of students to and from schools for Parkland School Division and partner schools. Records for Special Education, off site activities, field trips, and special programs. Records include bus schedules, requests for transportation, bus routes, boundaries and student lists (names and addresses), notification of emergency breakdowns. Excludes transportation bus costs See TR-01	Transportation Services	E + 7 Y	E = Aug. 31	Operational Value	PIB	Transportation – General
TR-21	Student Bus Misconduct Reporting	Includes records relating to behaviour / misconduct on buses. Excludes Accident reports See HS-04 and LE-01 for Claims .	Transportation Services / Schools	E + 1 Y	E = Aug. 31 of year of incident	Operational Value	PIB	
TR-22	Transportation Reports and Costing	Includes records on bus route costing, fuel rates, bus capacity loading, and records regarding the escalation and de-escalation of fuel prices for vehicles and buses and its impact on the Bus Transportation Contract with the bus line Operators. Excludes Student Bus Services See TR-20	Transportation Services	E + 7 Y	E = Aug. 31	Operational Value		
TR-23	Transportation Services Parent Handbook	Includes records related to communications to parents about processes and services provided for the Division and partner schools.	Transportation Services	E = 0	E = Aug. 31			

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value	PIB	Prior Parkland School Division Schedule
TR-24-01	Vehicle	Includes records relating to vehicle, insurance and registration, copies of purchase invoice, bill of sale, vehicle specifications, modification records (i.e. wheelchair lift installation), maintenance logs, records pertaining to maintenance, accident reports, repairs, and insurance. Excludes vehicle inspections See TR-24-02	Transportation Services	E + 5 Y	E = Life of Vehicle .		PIB	Vehicles
TR-24-02	Vehicle - Inspection	Includes daily and monthly trip inspection reports for Division vehicles.	Transportation Services	E + 6 months	E = Aug. 31 of year of inspection report			

RECORDS DISPOSITION AUTHORIZATION FORM – PARKLAND SCHOOL DIVISION

This form is for the destruction of records in accordance with AP 580, Records Management

School / Site:		Date:		Inventoried by:			Phone:
Record Number	Record Series	Description	Start Date YYYY/MM	End Date YYYY/MM	Retention	Notes	

DESTRUCTION APPROVALS: We certify that records listed above have been retained for the scheduled retention period, required audits have been completed, and no pending or ongoing litigation or investigation involving these records is known to exist.

	Print Name	Signature	Date
Administrator / Department Head:			
1. Send form to Corporate Supports & Services at (Records.Management@psd70.ab.ca) for review and approval			
Executive Secretary:			
2. Form will be sent back to the school / site to implement disposition			
Records Destroyed By:			
3. After records have been destroyed, file.			