

DOCUMENT CONSERVATION RULES

COMPENDIUM

of conservation rules
for school boards

{GRAPHIC}



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FOREWORD

FOREWORD

The Fédération des commissions scolaires du Québec is pleased to present the new *Compendium of Conservation Rules for School Boards*, which came to be thanks to the hard work of representatives of the National Archives of Quebec, of school boards, and of the Fédération.

As part of its work, the committee set itself the objective of meeting the administrative requirements of school boards, under strict adherence to existing laws, and with due regard to the preservation of their history. The committee was comprised of the following people:

Ms. Diane Beaulieu	Commission scolaire de la Capitale;
Ms. Guyanne Couture	Commission scolaire de la Capitale;
Ms. Marie Dubé	Commission scolaire des Découvreurs;
Ms. Nicole Fortin	Commission scolaire de la Beauce- Etchemin;
Mr. Claude Gerbeau	Commission scolaire de la Capitale;
Mr. Alain Guimont	Fédération des commissions scolaires du Québec;
Mr. Gilles Héon	National Archives of Quebec;
Mr. Michel Hudon	Commission scolaire de la Côte-du-Sud;
Ms. Régine Laberge	Commission scolaire de Charlevoix;
Ms. Line Matte	Commission scolaire de Portneuf.

The new *Compendium of Conservation Rules for School Boards* has been reorganized to allow users faster access to its contents. The classification structure of the former Compendium has been retained, but several changes have been made to the list of series, to the title and to the description of rules and conservation periods. To avoid bloat, it was decided that only holders of primary documents would be included in the compendium.

To better meet the needs expressed by users, approximately 150 document titles have been added to the compendium, along with new conservation rules and a new series on day care services. Particular attention has also been paid to the Table of Contents and the Index in order to facility searches. An explanatory table has also been added at the end of each page.

TERMINOLOGY USED

TERMINOLOGY USED

The *Archives Act* defines the following terms:

Archives

“Body of documents of all kinds, regardless of date, created or received by a person or body in meeting requirements or carrying on activities, preserved for their general information value.”

Document

“Information inscribed on a medium constitutes a document. The information is delimited and structured, according to the medium used, by tangible or logical features, and is intelligible in the form of words, sounds or images. The information may be rendered using any type of writing, including a system of symbols that may be transcribed into words, sounds or images or another system of symbols.

A database whose structuring elements allow the creation of documents by delimiting and structuring the information contained in the database is also considered to be a document.”

Active document

“A document in current use for administrative or legal purposes.”

Semi-active document

“A document in occasional use for administrative or legal purposes.”

Inactive document

“A document no longer used for administrative or legal purposes.”

Retention schedule

“A retention schedule determines the periods of use and medium of retention of active and semi-active documents, and indicates which inactive documents are to be preserved permanently and which are to be disposed of.”

The *Archives Act and Regulation respecting retention schedules, transfer, deposit and disposal of public archives* provides the following definitions:

Record

“Body of documents pertaining to a given subject.”

Main record

“Record containing the most complete information on a given subject.”

Secondary record

“Record containing some of the information in a main record or a copy of all the information contained therein.”

Series of records

“A body of records.”


**INSTRUCTIONS FOR PRESENTING
A RETENTION SCHEDULE**

INSTRUCTIONS FOR PRESENTING A RETENTION SCHEDULE

General rules

Section 7 of the *Archives Act* (R.S.Q., c. A-2.1) requires that each school board establish and maintain an up-to-date retention schedule determining the periods of use and medium of retention of its active and semi-active documents, and indicating which inactive documents are to be preserved permanently, and which are to be disposed of. Section 8 of the same Act also requires each school board to submit its retention schedule and any amendments made to the schedule, including the addition of new documents, or concerning documents to be preserved permanently, to the Minister of Culture and Communications for approval. *Document* means information that is stored on a medium, and that is intelligible and rendered using words, sounds or images, in accordance with section 3 of the *Act to establish a legal framework for information technology* (L.Q. 2001, c.32). Moreover, the *Regulation respecting retention schedules, transfer, deposit and disposal of public archives* (Order 1894-85, September 18, 1985) requires that each school board enter the following information for each series, record or document included in the schedule: the name of the school board; the title of the series, record or document; a summary description of its contents; the name of the administrative unit holding the main records of the series; the main record or the document, and lastly, an overview of its usage.

In addition to this, a school board's retention schedule must also contain the following information: each retention rule's number, how long the documents will be in active and semi-active use, distinguishing the various information media, if applicable, information relating to the use of code 888, the disposal mode retained, and the document selection criteria, where applicable.

To facilitate the writing of a school board's retention schedule rules, the Fédération des commissions scolaires du Québec, in collaboration with the National Archives of Quebec, has broken new ground by also presenting the Compendium of Conservation Rules for School Boards in electronic format, and made it available to the site reserved for FCSQ members. Each school board can use this compendium, and add its custom information in the appropriate sections in the "Title and Description" area of each rule. Furthermore, the holder of the series, the record or the document to which the rule applies can be identified through the area bearing the  symbol located right below the number of each rule. The example on page XIII explains these two possibilities. Rules can also be added to the end of a chapter, where applicable.

Final document layout

This compendium was produced following consultations with school administrators, legal advisors and experienced practitioners. It is strongly recommended that its contents be adhered to, particularly with respect to the final layout of documents; this will ensure that archival groups built are homogenous and are truly representative of our school boards.

Series, record or primary document holder

Disclosure of the series, record or primary document is mandatory under the regulation cited above. However, it must be noted that any changes made to this information may only be submitted to the Minister for approval if it relates to documents that will be permanently preserved.

To ensure sound document management, it is strongly recommended to ensure that, everything being equal, the length of retention of secondary series, records or documents be longer than that for primary series, records or documents. Similarly, care must be taken to ensure that secondary series, records or documents are eliminated following their active periods.

Multiple media or change of media

This compendium establishes active and semi-active periods as well as the final document paper layout. However, if a series, record or document exists on a medium other than paper, then the type of medium must be specified, along with its duration of use and its final layout.

Media codes

- S1 Microforms – microfilm, microfiche;
- S2 Computer media – diskette, optical disk, hard drive, CD, DVD;
- S3 Magnetic media – cassette, ribbon, magnetic tape, film;
- S4 Other media – photographs, slides, transparencies.

Transcription of computerized documents

The National Archives of Quebec provides a form for transcribing of computerized documents, that is, databanks or computer files. The document, *Modèle pour l'inscription des documents informatiques au calendrier de conservation des documents*, is available upon request, along with the appropriate form, in electronic format from the National Archives of Quebec.

Digitization of documents listed in the retention schedule

Any digitization program must adhere to the stipulations of the *Civil Code of Québec*, of the *Act to establish a legal framework for information technology* and of the *Guide d'imagerie numérique - Numérisation de l'information consignée sur des supports traditionnels*, produced by the National Archives of Quebec.

The request for approval of rules on digitized documents must be accompanied by the *Numérisation de documents inscrits au calendrier de conservation* (ANQ 031998) form, which is available in electronic format from the National Archives of Quebec.

Request for approval

Two copies of the retention schedule must be submitted to the National Archives of Quebec, along with the following documents:

- a title page dated and signed by an authorized person;
- a copy of your records classification scheme, if available;
- a certified copy of the resolution of the Board of school trustees or of the executive committee authorising someone to sign and submit the retention schedule the National Archives of Quebec.

Moreover, any amendment to the retention schedule must be dated and signed, and accompanied by the following documents:

- a copy of the amendment made to your records classification scheme for, if available;
- a certified copy of the resolution of the Board of school trustees or of the executive committee authorising someone to sign and submit the amendment to the National Archives of Quebec.

Example of a presentation of rules:

100 – GENERAL ADMINISTRATION					
Rule	Title and Description	A	S-A	IN	Remarks
101	History of the school board and of its institutions ----- Documents dealing with the history and official celebrations of the organization.	888*	0	S**	* Until the end of the research activity or of the celebration. ** Retain the program, the publications, the photographs and the final report
Space reserved for changes or additions					

Space for identifying the holder of the main record

Space for identifying any medium other than paper used, or to indicate amendments to the rule mentioned above

LIST OF SERIES

LIST OF SERIES

- 100 GENERAL ADMINISTRATION**
- 200 COMMUNICATIONS AND INFORMATICS**
- 300 LEGAL DOCUMENTS AND LEGAL AFFAIRS**
- 400 HUMAN RESOURCE MANAGEMENT**
- 500 FINANCIAL RESOURCE MANAGEMENT**
- 600 MATERIAL RESOURCE MANAGEMENT**
- 700 EDUCATIONAL ORGANIZATION**
- 800 STUDENT RECORDS**
- 900 TEACHING AND LEARNING SUPERVISION**
- 1000 ANCILLARY STUDENT SERVICES**

LIST OF RULES

LIST OF RULES

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CONSERVATION RULES FOR SCHOOL BOARDS

DOCUMENT CONSERVATION RULES


100 – GENERAL ADMINISTRATION

Rule	Title and Description	A	S-A	IN	Remarks
101 	History of the school board and of its institutions ----- Documents dealing with the history and official celebrations of the organization.	888*	0	S**	* Until the end of the research activity or of the celebration. ** Retain the program, publications, photographs and final report
	Space reserved for changes or additions				
102 	Constitution of the school board and of its institutions ----- – order of incorporation; – charter; – letters patent; – order establishing the name of the school board; – order establishing changes within territorial boundaries; – integration protocol; – integration order; – Deeds of Establishment.	2*	0	C**	
	Space reserved for changes or additions				


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100 – GENERAL ADMINISTRATION

Rule	Title and Description	A	S-A	IN	Remarks
103	<p>Data access and protection of personal information – Component 1</p> <p>-----</p> <p> Public documents:</p> <ul style="list-style-type: none"> – requests for access to documents; – receipt notification; – response of person managing access to documents in the public body. <p>Personal documents:</p> <ul style="list-style-type: none"> – communication request; – amendment request; – review request; – receipt notification; – response of person managing access to documents in the public body; – request for permission to appeal; – decision rendered on appeal; – recording of names of people who have consulted documents containing personal information. 	888*	0	D	<p>* Retain for 3 years after the decision by the person in charge or until exhaustion of remedies.</p> <p>Act respecting access to documents held by public bodies and the protection of personal information, R.S.Q., c. A-2.1, s. 43, 46, 47, 51, 94, 100, 102.1, 135, 137 and 147.</p>
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100 – GENERAL ADMINISTRATION

Rule	Title and Description	A	S-A	IN	Remarks
104	Data access and protection of personal information – Component 2 ----- Declaration of identified records to the Commission d'accès à l'information.	999	0	D	Act respecting access to documents held by public bodies and the protection of personal information, R.S.Q., c. A-2.1, s. 76.
					
	Space reserved for changes or additions				
105	Data access and protection of personal information – Component 3 ----- Agreement between public bodies for the communication of personal information. Authorization by the Commission d'accès à l'information.	888*	0	D	* 3 years following authorization or the end of the agreement. Act respecting access to documents held by public bodies and the protection of personal information, R.S.Q., c. A-2.1, s. 68, 70, and 125.
					
	Space reserved for changes or additions				
106	Administrative structure ----- Organization chart of the school board, of institutions and of departments.	999	0	C	
					
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100 – GENERAL ADMINISTRATION

Rule	Title and Description	A	S-A	IN	Remarks
107	Regulations and policies ----- Regulations and policies of the school board.	999	0	C	Education Act, R.S.Q., c. I-13.3, s. 396.
					
	Space reserved for changes or additions				
108	Directives, norms and procedures ----- Directives, norms and procedures of the school board.	999	7	S*	* Retain documents which relate to the activities of the organization.
					
	Space reserved for changes or additions				


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100 – GENERAL ADMINISTRATION

Rule	Title and Description	A	S-A	IN	Remarks
109	Service contracts and related documents ----- – estimates; – invitation to tender documents; – accepted bids; – rejected bids; – insurance contracts; – maintenance and repair contracts; – transportation contracts; – banking services contracts; – secondment contracts and agreements.	888*	6**	S***	* Term of contract, of agreement or until bidder is chosen. ** 3 years for rejected bids. *** retain contracts that have an impact on the history of the organization. Civil Code of Quebec, s. 2925, 3 years. Ministry of Revenue Act, R.S.Q., c. M-31, s. 35.1, 6 years. Income Tax Act, R.S.C. (1985), c. I, s. 230. Employment Insurance Act, 1996, c. 23, s. 87, 6 years. Income Tax Regulations, part LVIII, s. 5800.
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100 – GENERAL ADMINISTRATION

Rule	Title and Description	A	S-A	IN	Remarks
110 	Notice to appear, agenda and documents pertaining to sessions ----- – notice to appear; – agenda; – documentation relating to sessions and meetings: <ul style="list-style-type: none"> • Board of school trustees; • Executive committee; • Institutional council; • any other statutory committee; • external and joint committees. 	2	0	D	Education Act, R.S.Q., c. I-13.3, s. 163.
	Space reserved for changes or additions				
111 	Minutes and documents submitted at sessions – Component 1 ----- <ul style="list-style-type: none"> • Board of school trustees; • Executive committee; • Institutional council; 	2	0	C	Education Act, R.S.Q., c. I-13.3, s. 170, 172 and 179.
	Space reserved for changes or additions				


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100 – GENERAL ADMINISTRATION

Rule	Title and Description	A	S-A	IN	Remarks
112	Minutes and documents submitted at sessions – Component 2 - ----- – parents’ committee; – orientation committee; – school committee; – advisory committee for services to students with disabilities and adaptation or learning difficulties: EHDAA;  – student transportation advisory committee; – parent participation organization; – student participation organization; – any committee required by law, and regulations respecting education.	2	8	S*	* Retain minutes for Years 1 and 6 of each decade.
	Space reserved for changes or additions				
113	Minutes and documents pertaining to sessions ----- <ul style="list-style-type: none"> • management teams; • management and coordination tables; • special committees (to study specific matters); 	2	0	D	These documents are generally only used for consultation purposes.
	Space reserved for changes or additions				


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100 – GENERAL ADMINISTRATION

Rule	Title and Description	A	S-A	IN	Remarks
114 	Minutes and documents pertaining to meetings of external and joint committees in which the school board participates ----- Any joint committee including other stakeholders from outside the school board.	2	0	S*	* Retain documents that have an impact on the history of the school board.
	Space reserved for changes or additions				
115 	List of electors ----- List of electors	999	0	D	Act respecting school elections, R.S.Q., c. E-2.3, s. 39, 40, 42, 47 to 57.
	Space reserved for changes or additions				
116 	Electoral process ----- – request for addition to or removal from the list of electors; – notice of filing of list of electors; – constitution of Electoral list Board of revision.	888*	0	D	* 6 months after the new list of electors comes into effect. Act respecting school elections, R.S.Q., c. E-2.3, s. 42 to 46
	Space reserved for changes or additions				


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100 – GENERAL ADMINISTRATION

Rule	Title and Description	A	S-A	IN	Remarks
117 	Electoral team ----- – make-up of team; – request for recognition of team; – recognition of team; – change of team name.	888*	0	C	* Until the next general election. Act respecting school elections, R.S.Q., c. E-2.3, s. 65, 66 and 67.
	Space reserved for changes or additions				
118 	Notice, candidacy, election, nomination, results, swearing-in ----- – public notice of holding of an election; – nomination paper; – statement of withdrawal of nomination; – election proclamation; – swearing-in of trustees; – resignation or declaration of ineligibility of a trustee; – trustee’s appointment order; – election return.	888*	**	C***	* Until the end of the petition period. ** Until the next general election. *** retain if these documents are not submitted in board of trustees minutes Act respecting school elections, R.S.Q., c. E-2.3, s. 38, 62, 69, 70, 76, 79, 81, 82, 161, 163, 164, 191 to 198 and 199.
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100 – GENERAL ADMINISTRATION

Rule	Title and Description	A	S-A	IN	Remarks
119 	Conduct of vote ----- – election schedule, list of election officials, directives, appointment of deputy returning officer and of the secretary of the polling station and everything relating to the material organization of the electoral event; – record book; – statement of votes; – ballot; – swearing-in of election officials.	888*	**	S***	* Until the end of the petition period; next, destroy ballots. ** Mandate term. *** Retain the general election record book Act respecting school elections, R.S.Q., c. E-2.3, s. 92, 106, 111 to 129, 137.
	Space reserved for changes or additions				
120 	Election petition ----- – motion for an election petition; – motion for a judicial recount; – judgment.	888*	0	C	* Until exhaustion of the right of appeal. Act respecting school elections, R.S.Q., c. E-2.3, s. 147, and 175.
	Space reserved for changes or additions				


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100 – GENERAL ADMINISTRATION

Rule	Title and Description	A	S-A	IN	Remarks
121	Referendum and public consultation ----- Referendum: – public notice of the holding of a referendum; – voting record; – ballots; – statement by president. Public consultation: – public notice; – consultation report and related documents.	888*	0	S**	* Until the end of the petition period; next, destroy ballots. ** Retain if the documents have not been filed at Board of school trustees sessions. Education Act, R.S.Q., c. I-13.3, s. 346 to 351.
	Space reserved for changes or additions				
122	Ethics and code of conduct ----- – documents pertaining to conflicts of interest; – documents pertaining to the application of code of ethics and of conduct.	888*	6	D	* Term of election warrant. Education Act, R.S.Q., c. I-13.3, s. 175.4.
	Space reserved for changes or additions				


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100 – GENERAL ADMINISTRATION

Rule	Title and Description	A	S-A	IN	Remarks
123	Administrative reports -----  <ul style="list-style-type: none"> - report to the ministère de l'Éducation; - annual report of school board, of institutions and of departments; - school board plan of action; - accountability. 	2	0	C	Education Act, R.S.Q., c. I-13.3, s. 219 and 220.
	Space reserved for changes or additions				
124	Statistics -----  <ul style="list-style-type: none"> - statistics on the school board. 	2	5	S*	* Retain statistics which clearly indicate the roles or an activity of the school board.
	Space reserved for changes or additions				


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100 – GENERAL ADMINISTRATION

Rule	Title and Description	A	S-A	IN	Remarks
125 	Civil liability ----- – documents pertaining to claims for material damage and bodily injury; – settlements without legal proceedings; – accident and incident reports; – notice to insurers.	888*	6	D	* Until the final settlement. ** 3 years if no claims. Requirements of insurance companies, 5 years. Civil Code of Quebec, s. 2925, 3 years. Section 2926 specifies the starting point if moral or material damage are involved, or bodily injury which occurs <u>gradually</u> .
	Space reserved for changes or additions				
126 	School board royalties – Component 1 ----- Transfer to a third party, licence or authorization by the holder of the rights to a manuscript, a software application, a photograph or an audio recording.	888*	6	D	* Term of assignment, of licence or of authorization. Copyright Act, R.S.C., c. C-42, s. 6.
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100 – GENERAL ADMINISTRATION

Rule	Title and Description	A	S-A	IN	Remarks
127	School board royalties – Component 2 ----- Documents indicating copyrights held by the school board.	888*	50**	D	* Term of assignment, of licence or of authorization. ** 50 years from the date of publication. Copyright Act, R.S.C., c. C-42, s. 11 and 12.
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200 – COMMUNICATIONS AND INFORMATICS

Rule	Title and Description	A	S-A	IN	Remarks
201	Document reproduction (printing and photocopy) -----  <ul style="list-style-type: none"> - planning and coordination of printing and photocopy services; - production planning; - requisitions; - statistics. 	1	0	D	
	Space reserved for changes or additions				
202	Document management – instruments -----  <ul style="list-style-type: none"> - retention schedule for documents and their amendments; - document classification plan and guide; - list of essential documents; - search instruments, index and thesaurus; - list of inactive documents; - intervention procedure in the event of disaster. 	999	0	S*	* Retain retention schedule and its amendments, the classification plan and guide, search instruments and indexes, as well as the list of inactive documents. Archives Act (R.S.Q., c. A-2.1.1).
	Space reserved for changes or additions				


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200 – COMMUNICATIONS AND INFORMATICS

Rule	Title and Description	A	S-A	IN	Remarks
203	Document management – destruction ----- Document destruction authorizations and certificates.	2	0	S*	* Retain certificates.
	Space reserved for changes or additions				
204	Data medium transfer ----- Documents pertaining to: – medium transfer: micrographics, digitization, etc.; – statement of reproduction and of destruction; – designation of authorized persons.	1	0	C	Civil Code of Quebec, s. 2840 to 2842. Act to establish a legal framework for information technology (L.Q. 2001, c.32).
	Space reserved for changes or additions				
205	Document from external sources ----- Information documents from outside sources capable of acting as a reference for administrative records.	1	0	S*	* Documents that have an impact on the history of the school board must be preserved in conformity with Rule 101.
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200 – COMMUNICATIONS AND INFORMATICS

Rule	Title and Description	A	S-A	IN	Remarks
206	Documents pertaining to bridging and civility -----  Invitations, condolence, greetings, thank-you notes, congratulations, communications letters, acknowledgments of receipt, information requests.	1	0	S*	* Documents that have an impact on the history of the school board must be preserved in conformity with Rule 101.
	Space reserved for changes or additions				
207	Documents pertaining to special events -----  <ul style="list-style-type: none"> - open houses; - exhibitions; - birthday and anniversary celebrations; - recognition dinners; - contests. 	2	0	S*	* Documents that have an impact on the history of the school board must be preserved in conformity with Rule 101.
	Space reserved for changes or additions				
208	Publications by the organization -----  <ul style="list-style-type: none"> - newsletters published under the authority of the school board; - school board press releases; - flyers, brochures and advertising posters. 	1	0	C	
	Space reserved for changes or additions				


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200 – COMMUNICATIONS AND INFORMATICS

Rule	Title and Description	A	S-A	IN	Remarks
209 	Complaints and suggestions ----- Documents pertaining to complaints and suggestions produced or received in the context of the school board's activities.	888*	0	D	* Until the final settlement.
	Space reserved for changes or additions				
210 	Software ----- Software and its usage documentation.	888*	0	S**	* Software usage term. ** Retain software developed by the organization as well as the related documentation.
	Space reserved for changes or additions				
211 	System documentation ----- Documentation on the use of databanks.	888*	0	S**	* As long as it serves for data usage. ** Retain system documentation developed by the organization.
	Space reserved for changes or additions				
212 	Data processing ----- Data entry slip.	888*	0	D	* Until data entered has been verified.
	Space reserved for changes or additions				


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200 – COMMUNICATIONS AND INFORMATICS

Rule	Title and Description	A	S-A	IN	Remarks
213	Computer systems security and backup ----- Backup of computer documents: – computer system recovery plan; – data copy procedure.	999	*	D	* Retain the last two versions.
	Space reserved for changes or additions				


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300 – LEGAL DOCUMENTS AND LEGAL AFFAIRS

Rule	Title and Description	A	S-A	IN	Remarks
301	Canadian and Quebec legislation and regulations ----- Laws, orders, regulations concerning, or of interest to, school boards: – municipal; – provincial; – federal.	999	0	D	
	Space reserved for changes or additions				
302	Public notices issued by the school board ----- Public notices issued in accordance with the Education Act and the Act respecting school elections.	888*	0	C	* Term of the application of the notice.
	Space reserved for changes or additions				
303	Interpretation of laws and regulations ----- Legal opinions requested by the school board.	888*	0	D	* As long as the notice is in compliance with the current law.
	Space reserved for changes or additions				


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300 – LEGAL DOCUMENTS AND LEGAL AFFAIRS

Rule	Title and Description	A	S-A	IN	Remarks
304	Judgment, settlement, transaction, acquittance -----  <ul style="list-style-type: none"> - judgment; - settlement; - transaction; - acquittance. 	888*	10**	D	* Until the judgment, settlement or transaction is executed or until the acquittance is signed. ** For documents dated before 1994, retain until 2004. Civil Code of Quebec, s. 2924, 10 years.
	Space reserved for changes or additions				
305	Judicial and legal proceedings : related documents -----  <ul style="list-style-type: none"> - formal demand; - copies of writs; - lists of exhibits; - appearance notices (subpoenas); - mail exchange with the school board attorney; - public notice for bailiff's sale. 	888*	3	D	* Until the judgment or settlements are executed. Civil Code of Quebec, s. 2925, 3 years. Education Act, R.S.Q., c. I-13.3, s. 329 and 330.
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400 – HUMAN RESOURCE MANAGEMENT

Rule	Title and Description	A	S-A	IN	Remarks
401	Staffing – Component 1 ----- <div style="display: flex; align-items: flex-start;"> <div style="margin-right: 10px;"></div> <ul style="list-style-type: none"> – documents pertaining to staffing; – needs analysis and staffing planning; – relief assignment list. </div>	999	0	D	
	Space reserved for changes or additions				
402	Staffing – Component 2 ----- <div style="display: flex; align-items: flex-start;"> <div style="margin-right: 10px;"></div> <ul style="list-style-type: none"> – staff call-back list; – hiring priority list; – lay-offs list. </div>	999	12	D	
	Space reserved for changes or additions				
403	Service offers ----- <div style="display: flex; align-items: flex-start;"> <div style="margin-right: 10px;"></div> <p>Job application made outside an official recruitment process.</p> </div>	0.5	0	D	
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400 – HUMAN RESOURCE MANAGEMENT

Rule	Title and Description	A	S-A	IN	Remarks
404	Recruitment – Component 1 -----  <ul style="list-style-type: none"> – notice of competition; – service offer; – make-up of selection committee; – report of selection committee; – response to candidates; – selection tests; – French tests for candidates who were not retained. 	2	0	D	
	Space reserved for changes or additions				
405	Recruitment – Component 2 -----  <ul style="list-style-type: none"> – testing model; – testing protocol; – correction protocol. 	999	0	C	
	Space reserved for changes or additions				
406	Personnel classification -----  Personnel classification plan.	999	0	D	
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400 – HUMAN RESOURCE MANAGEMENT

Rule	Title and Description	A	S-A	IN	Remarks
407	Staff movements -----  <ul style="list-style-type: none"> - documents pertaining to staff movements; - personnel movements, promotions, demotions and terminations list; - list of personnel by job class, by institution, etc.; - temporary lay-offs. 	999	3	D	
	Space reserved for changes or additions				
408	Report on school board personnel -----  Report on the roles and other information on employees of the school board on September 30 (PERCOS)	2	5	D	
	Space reserved for changes or additions				


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400 – HUMAN RESOURCE MANAGEMENT

Rule	Title and Description	A	S-A	IN	Remarks
409	Employee record – Component 1 -----  <ul style="list-style-type: none"> – union membership; – task description; – work schedule; – probation; – swearing-in or solemn declaration; – performance assessment or grading; – correspondence; – temporary teaching certificate. 	888*	7	D	* Term of employment.
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400 – HUMAN RESOURCE MANAGEMENT

Rule	Title and Description	A	S-A	IN	Remarks
410	<p>Employee record – Component 2</p> <p>-----</p> <ul style="list-style-type: none"> - TD1, TPD1 source deductions return; - salary deductions (donation to Centraide, bond purchases, etc.) - certificate of absence (with abstract, report, history, fact sheets); - employment record or termination (Human Resources Development Canada); - insurance; - extra charge statement (group leader, excess students, school administrator); - garnishment of wages; - requested vacation dates and authorization. 	2*	5	D	<p>* Retain the employee's source deductions return until he is replaced.</p> <p>Retain requested vacation dates and authorization for 2 years.</p> <p>Civil Code of Quebec, s. 2925, 3 years.</p> <p>Ministry of Revenue Act, R.S.Q., c. M-31, s. 35.1, 6 years.</p> <p>Income Tax Act, R.S.C. (1985), c. I, s. 230.</p> <p>Employment Insurance Act, 1996, c. 23, s. 87, 6 years.</p> <p>Income Tax Regulations, part LVIII, s. 5800.</p>
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400 – HUMAN RESOURCE MANAGEMENT

Rule	Title and Description	A	S-A	IN	Remarks
411	Employee record – Component 3 ----- <ul style="list-style-type: none"> - retroactivity of miscellaneous payments; - processing review; - summary (salary and other information); - 4% vacation payment. 	2	57	D	
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400 – HUMAN RESOURCE MANAGEMENT

Rule	Title and Description	A	S-A	IN	Remarks
412	<p>Employee record – Component 4</p> <p>-----</p> <p> Documents pertaining to personal information: name, gender, address, nationality, birth certificate, matrimonial status, number of children, service offer, résumé.</p> <p>Contract of employment (transfer of rights), academic transcripts, verification of experience, resignation letter.</p> <p>Final decision concerning personnel movement: appointment, stand-by, transfer, demotion, lay-off, secondment, wage progression, promotion, discharge.</p> <p>Final decision concerning holidays: unpaid leave of absence, paid leave, self-funded leave, parental leave, long-term union leave.</p> <p>Employee’s work history: memo, notice, Employee Departure Form, employment visa.</p> <p>French test results.</p>	888*	7**	S***	<p>* Term of employment.</p> <p>** It is important that all information respecting salary variations and cuts for an employee participating in the retirement plan be preserved until the employee turns 75.</p> <p>*** Retain the records of employees born in Year 1 of each decade (1951, 1961, etc.).</p>
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400 – HUMAN RESOURCE MANAGEMENT

Rule	Title and Description	A	S-A	IN	Remarks
413	Employee record – Component 5 ----- – total instructional time for trainers; – garnishment of wages; – adjudication decision and out-of-court settlements; – disciplinary measures; – death notification. 	888*	7**	D	* Term of employment. ** It is important that all information respecting salary variations and cuts for an employee participating in the retirement plan be preserved until the employee turns 75. Comply with collective agreement provisions for disciplinary measures. Civil Code of Quebec, s. 2925, 3 years. Ministry of Revenue Act, R.S.Q., c. M-31, s. 35.1, 6 years. Income Tax Act, R.S.C. (1985), c. I, s. 230. Employment Insurance Act, 1996, c. 23, s. 87, 6 years. Income Tax Regulations, part LVIII, s. 5800.
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400 – HUMAN RESOURCE MANAGEMENT

Rule	Title and Description	A	S-A	IN	Remarks
414 	Employee record – Component 6 ----- Pension fund (enrolment, buy-back, reimbursement).	888*	7**	D	* Term of employment. ** It is important that all information respecting salary variations and cuts for an employee participating in the retirement plan be preserved until the employee turns 75.
	Space reserved for changes or additions				
415 	Employee record – Component 7 ----- – timesheets; – relief timesheets; – attendance sheets; – notices regarding compensation; – attestations of term of employment; – documents pertaining to holidays and salary cuts.	2	5*	D	* 57 years if no summary is available.
	Space reserved for changes or additions				
416 	Employee record – Component 8 ----- – summary of absences; – summary of time and relief assignments.	2	57	D	
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400 – HUMAN RESOURCE MANAGEMENT

Rule	Title and Description	A	S-A	IN	Remarks
417	Employee health record – Component 9 ----- Documents pertaining to: – industrial accidents; – occupational disease; – occupational health and safety; – medical tests; – salary insurance; – maternity.	2	57	D	Act Respecting Occupational Health and Safety, R.S.Q., c. S-2.1. Act respecting industrial accidents and occupational diseases, R.S.Q. c. A. A-3.001.
	Space reserved for changes or additions				
418	Trainee’s record received by school board ----- Trainee’s record received by the school board.	2	0	D	
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400 – HUMAN RESOURCE MANAGEMENT

Rule	Title and Description	A	S-A	IN	Remarks
419	Occupational health and safety file (general school board file) ----- All documents pertaining to relations between the school board and the Commission de santé et sécurité au travail: – circulars; – notices of assessment; – rate amendments; – correspondence.	2	5	D	
	Space reserved for changes or additions				
420	Group insurance and retirement plan (general school board file) ----- Documents pertaining to group insurance (health insurance, salary insurance, dental insurance) and to the pension plan.	888*	3	D	* As long as the insurance and plan are in effect or as long as there are beneficiaries or claimants (as long as it is possible to benefit from the plan). Civil Code of Quebec, s. 2925, 3 years.
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400 – HUMAN RESOURCE MANAGEMENT

Rule	Title and Description	A	S-A	IN	Remarks
421 	Labour organizations, managers associations, senior executives associations ----- Records for labour organizations, managers associations and senior executives associations.	888*	5	D	* As long as the associations represent members of the school board. Labour Code, R.S.Q. c. C-27, s. 11, 52 to 93 and others.
	Space reserved for changes or additions				
422 	Accreditations ----- Accreditation of employee associations.	999	0	C	
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400 – HUMAN RESOURCE MANAGEMENT

Rule	Title and Description	A	S-A	IN	Remarks
423	<p>Negotiations and labour disputes -----</p> <p>Documents pertaining to negotiations:</p> <ul style="list-style-type: none"> – mandate given to a school board association to negotiate a collective agreement; – notice of meeting for purposes of negotiating and reaching a collective agreement; – documents relating to provincial and local negotiations. <p>Documents pertaining to labour disputes:</p> <ul style="list-style-type: none"> – copy of notice to Minister of a lock-out declaration; – strike notice. 	888*	8	S**	<p>* Until the signature of the collective agreement or until the settlement of grievances resulting from the negotiation.</p> <p>** Retain documents pertaining to local negotiations and to labour disputes.</p> <p>Labour Code, R.S.Q. c. C-27, s. 11, 52 to 93 and others.</p>
	Space reserved for changes or additions				
424	<p>Collective agreements -----</p> <ul style="list-style-type: none"> – collective agreement reached with each employee association and local agreement; – government orders and regulation. 	999	8	C	Labour Code, R.S.Q. c. C-27, s. 11, 52 to 93 and others.
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400 – HUMAN RESOURCE MANAGEMENT

Rule	Title and Description	A	S-A	IN	Remarks
425 	Work relations – Component 1 ----- – appeal of a ruling by the labour commissioner; – work relations, excluding any document pertaining to work stoppages.	888*	8	D	* As long as appeals have not been exhausted. Labour Code, R.S.Q. c. C-27, s. 11, 52 to 93 and others.
	Space reserved for changes or additions				
426 	Work relations – Component 2 ----- – grievances; – adjudication decisions; – out-of-court settlements.	888*	35	D	* Until a settlement is reached.
	Space reserved for changes or additions				
427 	Seniority list ----- Seniority list.	999	8	D	
	Space reserved for changes or additions				


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400 – HUMAN RESOURCE MANAGEMENT

Rule	Title and Description	A	S-A	IN	Remarks
428 	Work relations committees: minutes ----- – committees formed under collective agreements; – work relations committee; – grievance committee; – professional development committee; – negotiation committee.	2	8	D	Labour Code, R.S.Q. c. C-27, s. 11, 52 to 93 and others.
	Space reserved for changes or additions				
429 	Human resource training and development ----- – program; – authorization request; – declaration under the law.	2	0*	S**	* 5 years for the declaration. ** Retain programs developed by the organization. An Act to foster the development of manpower training, R.S.Q., c. D-7.1.
	Space reserved for changes or additions				
430 	Employee assistance counselling ----- – assistance program for employees.	2	3	S*	** Retain programs developed by the organization.
	Space reserved for changes or additions				


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500 – FINANCIAL RESOURCE MANAGEMENT

Rule	Title and Description	A	S-A	IN	Remarks
501	Budget and grants -----  <ul style="list-style-type: none"> - analysis documents used in preparing budget estimates; - supplementary allocation requests and authorizations; - budget estimates; - budget approvals by the Minister; - official budget (version presented to the Minister and detailed version for the school board); - report on budget commitments; - budget parameters and rules; - grant communication letters; - budget revision presented to the Board of school trustees; - budget certification; - budget transfer. 	2	5	S*	* Retain budget approvals and the official budget.
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500 – FINANCIAL RESOURCE MANAGEMENT

Rule	Title and Description	A	S-A	IN	Remarks
502	Registers, ledgers and accounting lists -----  <ul style="list-style-type: none"> - journal entries (general journal); - general ledger; - cash receipts; - cash outflows; - cheque register; - accounts payable register or list; - accounts receivable register or list; - chronological transactions register; - accounting entry plan; - trial balance. 	2	5	S*	* Retain the general ledger, cash receipts, cash payouts and journal entries (general journal); if the ledger contains cash receipt, cash payout and general journal information, retain only the general ledger. Ministry of Revenue Act, R.S.Q., c. M-31, s. 35.1, 6 years. Income Tax Act, R.S.C. (1985), c. I, s. 230. Income Tax Regulations, part LVIII, s. 5800.
	Space reserved for changes or additions				
503	Government taxes -----  Documents pertaining to: <ul style="list-style-type: none"> - customs and excise duties; - Goods and Services Tax (GST); - Quebec Sales Tax (QST); - tax exemption (small suppliers). 	2	5	D	Ministry of Revenue Act, R.S.Q., c. M-31, s. 35.1, 6 years. Income Tax Act, R.S.C. (1985), c. I, s. 230. Income Tax Regulations, part LVIII, s. 5800.
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500 – FINANCIAL RESOURCE MANAGEMENT

Rule	Title and Description	A	S-A	IN	Remarks
504	Provisional reports, statements and lists ----- <ul style="list-style-type: none"> - list of suppliers; - list of non-cash liabilities; - general ledger updates; - financial position statement – interim reports 	999	0	D	
					
	Space reserved for changes or additions				
505	Personnel income tax slips ----- <ul style="list-style-type: none"> - T4 and T4A; - Relevé 1 slip (TP4); - any other tax slip. 	2	57	D	Ministry of Revenue Act, R.S.Q., c. M-31, s. 35.1, 6 years. Income Tax Act, R.S.C. (1985), c. I, s. 230. Income Tax Regulations, part LVIII, s. 5800.
					
	Space reserved for changes or additions				
506	Retirement plan: reports ----- <ul style="list-style-type: none"> - retirement plan reconciliation or validation reports; - annual report submitted to the <i>Commission administrative des régimes de retraite et d'assurances</i> (CARRA). 	2	57	D	
					
	Space reserved for changes or additions				


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500 – FINANCIAL RESOURCE MANAGEMENT

Rule	Title and Description	A	S-A	IN	Remarks
507 	Payroll: reports ----- – salary journal or register; – salary update; – exemptions and salary deductions report (pay).	2	5*	D	* 57 years, the salary journal or register if the history or summary is not available. Ministry of Revenue Act, R.S.Q., c. M-31, s. 35.1, 6 years. Income Tax Act, R.S.C. (1985), c. I, s. 230. Income Tax Regulations, part LVIII, s. 5800.
	Space reserved for changes or additions				
508 	Payroll: history ----- Cumulative pay as at June 30 and December 31 for each employee.	2	57	D	Ministry of Revenue Act, R.S.Q., c. M-31, s. 35.1, 6 years. Income Tax Act, R.S.C. (1985), c. I, s. 230. Income Tax Regulations, part LVIII, s. 5800.
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500 – FINANCIAL RESOURCE MANAGEMENT

Rule	Title and Description	A	S-A	IN	Remarks
509	Revenues: supporting materials -----  – invoices for school tuition, room rentals and sales or various materials; – copies of receipts.	2	5	D	Civil Code of Quebec, s. 2925, 3 years. Ministry of Revenue Act, R.S.Q., c. M-31, s. 35.1, 6 years. Income Tax Act, R.S.C. (1985), c. I, s. 230. Income Tax Regulations, part LVIII, s. 5800.
	Space reserved for changes or additions				
510	Expenses: supporting materials -----  – purchase and supply request; – purchase order; – purchase invoice; – delivery order; – credit note; – statement of account; – travel costs; – petty cash reimbursement request.	2	5	D	Civil Code of Quebec, s. 2925, 3 years. Ministry of Revenue Act, R.S.Q., c. M-31, s. 35.1, 6 years. Income Tax Act, R.S.C. (1985), c. I, s. 230. Income Tax Regulations, part LVIII, s. 5800.
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500 – FINANCIAL RESOURCE MANAGEMENT

Rule	Title and Description	A	S-A	IN	Remarks
511	Banking operations: supporting materials -----  <ul style="list-style-type: none"> - bank books or statements; - deposit slips; - bank statements; - bank certifications; - cheques, money orders, bank drafts; - bank reconciliations. 	2	5	D	Civil Code of Quebec, s. 2925, 3 years. Ministry of Revenue Act, R.S.Q., c. M-31, s. 35.1, 6 years. Income Tax Act, R.S.C. (1985), c. I, s. 230. Income Tax Regulations, part LVIII, s. 5800.
	Space reserved for changes or additions				
512	Assessment roll and amendment -----  <ul style="list-style-type: none"> - assessment roll; - notice of amendment; - assessor's certificate. 	3	3	D	Civil Code of Quebec, s. 2925, 3 years.
	Space reserved for changes or additions				


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500 – FINANCIAL RESOURCE MANAGEMENT

Rule	Title and Description	A	S-A	IN	Remarks
513	School taxes: related documents ----- – tax account; – copies of tax account receipts; – compensation in lieu of school taxes;  – reconciliation of tax accounts receivable; – history of tax accounts receivable; – tax roll; – warrant for arrest of property; – list of immovable properties to be sold for non-payment of taxes.	2*	5	D	* 2 years or until dispute is settled. Civil Code of Quebec, s. 2925, 3 years. Ministry of Revenue Act, R.S.Q., c. M-31, s. 35.1, 6 years. Income Tax Act, R.S.C. (1985), c. I, s. 230. Income Tax Regulations, part LVIII, s. 5800.
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500 – FINANCIAL RESOURCE MANAGEMENT

Rule	Title and Description	A	S-A	IN	Remarks
514	Short-, medium- and long-term loans ----- <div style="display: flex; align-items: flex-start;"> <div style="margin-right: 10px;"></div> <ul style="list-style-type: none"> - promissory notes; - loan contracts; - line of credit contracts; - loan authorizations; - bond certificates; - interest coupons. </div>	888*	6	S**	* Until maturity. ** Retain bond certificates and interest coupons if the book of account is not available. Civil Code of Quebec, s. 2925, 3 years. Ministry of Revenue Act, R.S.Q., c. M-31, s. 35.1, 6 years. Income Tax Act, R.S.C. (1985), c. I, s. 230. Income Tax Regulations, part LVIII, s. 5800.
	Space reserved for changes or additions				
515	Long-term loans: register ----- <div style="display: flex; align-items: flex-start;"> <div style="margin-right: 10px;"></div> <ul style="list-style-type: none"> - register of bond certificates and transfers. </div>	888*	0	C	* Until maturity.
	Space reserved for changes or additions				


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500 – FINANCIAL RESOURCE MANAGEMENT

Rule	Title and Description	A	S-A	IN	Remarks
516 	Long-term loans: supporting file ----- Bond issuance supporting record.	888*	6	D	* Term of bond. Public Curator Act, R.S.Q., c. C-81, s. 24.1: requirement to hold a declaration or moneys for the repayments of bonds for 3 years following maturity before transmission to the Public curator.
	Space reserved for changes or additions				
517 	Audit reports ----- – financial statements and Minister’s approval; – internal auditor’s report; – external auditor’s report; – financial statement supporting documents.	2	5	S*	* Retain financial statements, the Minister’s approval and auditors’ report.
	Space reserved for changes or additions				
518 	Fundraising campaign ----- – financial contributions; – records and supporting materials.	2	5	D	
	Space reserved for changes or additions				


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600 – MATERIAL RESOURCE MANAGEMENT

Rule	Title and Description	A	S-A	IN	Remarks
601	Acquisition and disposal of movables -----  <ul style="list-style-type: none"> - tendering documents; - accepted and rejected bids; - contracts and related documents. 	3	3*	D	* 0 for rejected bids. Civil Code of Quebec, s. 2925, 3 years. Ministry of Revenue Act, R.S.Q., c. M-31, s. 35.1, 6 years. Income Tax Act, R.S.C. (1985), c. I, s. 230. Income Tax Regulations, part LVIII, s. 5800.
	Space reserved for changes or additions				
602	Loan and rental of movables -----  Contracts and related documents.	888*	6	D	* Term of contract. Civil Code of Quebec, s. 2925, 3 years. Ministry of Revenue Act, R.S.Q., c. M-31, s. 35.1, 6 years. Income Tax Act, R.S.C. (1985), c. I, s. 230. Income Tax Regulations, part LVIII, s. 5800.
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600 – MATERIAL RESOURCE MANAGEMENT

Rule	Title and Description	A	S-A	IN	Remarks
603	Inventory ----- Inventory of movables. 	999	0	D	
	Space reserved for changes or additions				
604	Property titles ----- – notarized contracts and related documents; – survey and location certificates; – deed of easement and any charge or encumbrance on immovables. 	888*	0	C	* Property right term.
	Space reserved for changes or additions				


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600 – MATERIAL RESOURCE MANAGEMENT

Rule	Title and Description	A	S-A	IN	Remarks
605	Loan and rental of immovables ----- – contracts and related documents – emphyteutic leases.	888*	6	S**	* Term of contract. ** ~ Retain emphyteutic leases. Civil Code of Quebec, s. 2925, 3 years. Ministry of Revenue Act, R.S.Q., c. M-31, s. 35.1, 6 years. Income Tax Act, R.S.C. (1985), c. I, s. 230. Income Tax Regulations, part LVIII, s. 5800.
	Space reserved for changes or additions				
606	Acquisition and disposal of immovables ----- – tendering documents; – accepted and rejected bids.	3	3*	D	* 0 for rejected bids. Civil Code of Quebec, s. 2925, 3 years.
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600 – MATERIAL RESOURCE MANAGEMENT

Rule	Title and Description	A	S-A	IN	Remarks
607	Construction, renovation and repair of immovable – Component 1 -----  <ul style="list-style-type: none"> – documents relating to the selection of professionals; – instructions to bidders; – rejected bids; – bid warranty, execution warranty, etc. – building permit; – minutes of the bid selection committee; – minutes of worksite meetings; – notices of changes; – certificates of payment; – contract termination; – acquittance; – list of deficiencies. 	888*	10**	D	* Until all work is completed. ** ~ 3 years for rejected bids.
	Space reserved for changes or additions				


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600 – MATERIAL RESOURCE MANAGEMENT

Rule	Title and Description	A	S-A	IN	Remarks
608	Construction, renovation and repair of immovables – Component 2 -----  <ul style="list-style-type: none"> - Preliminary studies (geotechnics, obsolescence, etc.); - MEQ authorization; - tendering documents (public notice, plans and specifications, etc.); - book of specifications; - accepted bids; - contracts; - final work acceptance; - technical drawings and maintenance manual. 	888*	10	S**	* Until all work is completed. ** Retain all documents pertaining to the work that are subject to the Regulation respecting Construction contracts for immovables of school boards (s. 2).
	Space reserved for changes or additions				
609	Internal repair and maintenance -----  <ul style="list-style-type: none"> - repair requests; - labourers' work sheets; - cost estimates; - expense reports. 	2	0	D	
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600 – MATERIAL RESOURCE MANAGEMENT

Rule	Title and Description	A	S-A	IN	Remarks
610	Studies and reports on immovables -----  <ul style="list-style-type: none"> - air balancing reports; - water quality reports; - cleaning and ventilation reports; - environmental analyses; - buildings inspections reports; - market value studies; - energy savings reports. 	888*	6	S**	* Until implementation or rejection of reports or studies. ** Retain environmental quality reports and studies.
	Space reserved for changes or additions				
611	Distribution and disposal of immovables -----  <ul style="list-style-type: none"> - three-year immovable distribution and disposal plan; - school board pool of immovables (BICS); - <i>systeme d'information des organismes</i> (SIO). 	999	3	C	Education Act, R.S.Q., c. I-13.3, s. 211.
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600 – MATERIAL RESOURCE MANAGEMENT

Rule	Title and Description	A	S-A	IN	Remarks
612	Security: monitoring -----  <ul style="list-style-type: none"> - documents pertaining to the monitoring of buildings; - guards' reports; - visitors' register; - keys register. 	1	0*	D	* 3 years for incident reports produced by guards.
	Space reserved for changes or additions				
613	Security: measures -----  <ul style="list-style-type: none"> - documents pertaining to security systems: fire protection, alarm system, electronic surveillance; - emergency measures plan; - documents pertaining to hazardous materials (WHMIS). 	999	0	D	
	Space reserved for changes or additions				
614	Parking -----  <ul style="list-style-type: none"> - documents pertaining to the management of parking spaces; - permits; - development of spaces; - users' rental contracts. 	1	0	D	
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700 – EDUCATIONAL ORGANIZATION

Rule	Title and Description	A	S-A	IN	Remarks
701 	Unauthorized derogation ----- Derogation requests not authorized by the Minister.	888*	6	D	* Until a final decision is reached. Authorized derogations are placed in the student's record (see Rule 802).
	Space reserved for changes or additions				
702 	Educational services agreement ----- – agreement, protocol and contract between school boards and other public or private bodies for the delivery of educational services; – any other agreement for the delivery of supplementary and specific services covered in program organization.	888*	6	D	* Until the end of the term of the agreement. Civil Code of Quebec, s. 2925, 3 years. Education Act, R.S.Q., c. I-13.3, s. 213 and 214.
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700 – EDUCATIONAL ORGANIZATION

Rule	Title and Description	A	S-A	IN	Remarks
703	School population -----  <ul style="list-style-type: none"> – declaration of school population on September 30 each year by the school board and the ministère de l'Éducation; – declaration of users of day care services on September 30 each year by the school board and the ministère de l'Éducation; – school population directory as at September 30; – school population estimates and projections; – school population distribution plan. 	2	3	S*	* Retain official school population statements and the distribution plan.
	Space reserved for changes or additions				
704	School calendar -----  School calendar adopted by the school board.	1	0	C	
	Space reserved for changes or additions				
705	Pedagogical organization -----  <ul style="list-style-type: none"> – planning and organization; – preparation of timetable; – course calendar and student services directory. 	3	0	S*	* Retain the course and services directory in Years 1 and 6 of each decade.
	Space reserved for changes or additions				


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700 – EDUCATIONAL ORGANIZATION

Rule	Title and Description	A	S-A	IN	Remarks
706	Operating terms and conditions for institutions -----  <ul style="list-style-type: none"> - course schedule; - rules of conduct and security measures; - list of students by course and by level; - documents pertaining to student transfers between institutions.* 	2	0	D	* The transfer document should be retained in the student's record (Rule 801).
	Space reserved for changes or additions				
707	Educational activities -----  <ul style="list-style-type: none"> - annual activity programming; - document pertaining to the conduct of activities. 	2	0	D	
	Space reserved for changes or additions				
708	Practicums -----  <ul style="list-style-type: none"> - planning and coordination of student practicums; - practicum reports. 	2	0	S*	* Keep the practicum report in the record of the student undergoing a school adjustment.
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800 – STUDENT RECORDS

Rule	Title and Description	A	S-A	IN	Remarks
801	<p>Student's school record – Component 1</p> <p>-----</p> <ul style="list-style-type: none"> – documents pertaining to the registration, admission and transfer of preschool-, elementary- and secondary-level students; – school selection form; – course selection and related documents; – documents pertaining to the establishment of equivalencies; – absence monitoring reports and documents; – attendance monitoring reports and documents (adult and vocational training); – proof of school attendance; – student's schedule; – student's data sheet (in case of emergency). 	3	0	S*	<p>* For all students born in Year 1 of each decade (e.g.: 1971, 1981, etc.), you must permanently preserve documents indicating their social and family status.</p> <p>You are therefore responsible for identifying the forms on which this information appears.</p>
	Space reserved for changes or additions				


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800 – STUDENT RECORDS

Rule	Title and Description	A	S-A	IN	Remarks
802	<p>Student's school record – Component 2</p> <p>-----</p> <ul style="list-style-type: none"> - documents pertaining to the registration and admission of adult and vocational students; - authorized derogation (see Rule 701 for unauthorized derogation); - training profile (adult education and vocational training); - departure notice. 	888*	3	S**	<p>* As long as the student is attending an institution in the school board.</p> <p>** For all students born in Year 1 of each decade (e.g.: 1971, 1981, etc.), you must permanently preserve documents indicating their social and family status.</p> <p>You are therefore responsible for identifying the forms on which this information appears.</p>
	Space reserved for changes or additions				


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
800 – STUDENT RECORDS

Rule	Title and Description	A	S-A	IN	Remarks
803	Student's school record – Component 3 -----  <ul style="list-style-type: none"> – birth certificate or other documents identifying the student; – report cards issued by other school boards; – prior learning assessment (assessment of prior learning by the school board); – student registration or admission notice in another institution; – application for review of marks; – record transfer authorization by parental authority; – excusal from school attendance for a period of more than ten days; – documents pertaining to welcome and francization measures. 	888*	3	D	* As long as the student is attending an institution in the school board.
	Space reserved for changes or additions				
804	School results – preschool -----  Preschool report card or equivalent document.	888*	3	D	* Duration of primary school or until departure from the school board, if the departure occurs before the end of primary school.
	Space reserved for changes or additions				


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800 – STUDENT RECORDS

Rule	Title and Description	A	S-A	IN	Remarks
805 	School results – elementary ----- – year-end and end-of-cycle results.	888*	3**	S***	* As long as the student is attending an elementary education institution in the school board. ** Retain the report cards of students who attended English school until the students turn 75. *** Retain the last report card of students born in Year 1 of each decade (e.g.: 1971, 1981, etc.).
Space reserved for changes or additions					
806 	School results – secondary ----- – the most complete results for each year.	888*	**	S***	* As long as the student is attending a secondary education institution in the school board. ** Until the student turns 75. *** Retain the last report card of students born in Year 1 of each decade (e.g.: 1971, 1981, etc.).
Space reserved for changes or additions					


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
800 – STUDENT RECORDS

Rule	Title and Description	A	S-A	IN	Remarks
807	School results – vocational training ----- – recent results not certified by the MEQ; – training certificates.	888*	**	S***	* As long as the student is attending a vocational training institution in the school board. ** Until the student turns 75. *** Retain the last report card of students born in Year 1 of each decade (e.g.: 1971, 1981, etc.).
	Space reserved for changes or additions				
808	School results – adult education ----- – recent results not certified by the MEQ; – training certificates.	888*	**	S***	* As long as the student is attending an adult education institution in the school board. ** Until the student turns 75. *** Retain the last report card of students born in Year 1 of each decade (e.g.: 1971, 1981, etc.).
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800 – STUDENT RECORDS

Rule	Title and Description	A	S-A	IN	Remarks
809 	Logs and registers ----- – call logs or Department of Public Instruction forms; – class registers reporting on school life.	0	75	S*	* Retain all class registers and call logs for Year 1 of each decade (e.g.: 1951, 1961, etc.).
	Space reserved for changes or additions				
810 	Specific help file ----- Record including information on some students’ abilities (this information is held separately from the school record): – request and report by teacher or another stakeholder (psychoeducator, remedial teacher, special education technician, etc.), not including the professional counselling file; – correspondence to or from parents concerning the student; – service requests (to accompany a disabled student, etc.); – report to the Director of Youth Protection; – intervention plan and related documents.	888*	0	D	* 3 years after the last intervention.
	Space reserved for changes or additions				


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800 – STUDENT RECORDS

Rule	Title and Description	A	S-A	IN	Remarks
811	Professional services record -----  Records of students receiving professional services (orientation, psychology, speech therapy, audiology, etc.).	888*	0	D	* 5 years after the last intervention.
	Space reserved for changes or additions				
812	Discipline record -----  Documents pertaining to: – complaints; – disciplinary measures.	888*	0	D	* Until the situation has been resolved.
	Space reserved for changes or additions				


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900 – TEACHING AND LEARNING SUPERVISION

Rule	Title and Description	A	S-A	IN	Remarks
901 	Norms and criteria ----- – relating to local curricula; – educational materials.	999	0	D	
	Space reserved for changes or additions				
902 	Planning of educational activities ----- – consolidated success plan; – educational and pedagogic projects; – instructional development plan.	3	0	C	
	Space reserved for changes or additions				
903 	Teaching program and instructional material ----- Documents pertaining to: – teaching options authorizations (map of vocational training options); – local curricula; – lesson plans; – assessments; – approved educational materials.	888*	2	S**	* As long as the program is in effect. ** Retain teaching options authorizations and programs developed by the school board.
	Space reserved for changes or additions				


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900 – TEACHING AND LEARNING SUPERVISION

Rule	Title and Description	A	S-A	IN	Remarks
904 	Learning assessment – Component 1 ----- Measurement instruments and criteria used to assess learning: – examinations and achievement tests (original); – classification tests (original); – report cards (original).	999	0	S*	* Retain a take-home examination and a classification test per subject and per level every 5 years.
	Space reserved for changes or additions				
905 	Learning assessment – Component 2 ----- – copies of student’s examinations or work; – admission tests; – classification tests.	1	0	D	
	Space reserved for changes or additions				
906 	Learning assessment – Component 3 ----- Planning and coordination of the ministère’s examination days.	1	0	D	
	Space reserved for changes or additions				


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900 – TEACHING AND LEARNING SUPERVISION

Rule	Title and Description	A	S-A	IN	Remarks
907 	Diploma ----- – documents relating to diplomas; – list of diplomas; – list of students to whom certificates of proficiency have been awarded (adult education and vocational training).	2	57*	D	* List of graduates and of students to whom certificates of proficiency have been awarded.
	Space reserved for changes or additions				
908 	Professional development days ----- Planning of professional development days, leadership and workshop programs.	1	0	S*	* Retain assessment programs and reports developed by the organization.
	Space reserved for changes or additions				


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900 – TEACHING AND LEARNING SUPERVISION

Rule	Title and Description	A	S-A	IN	Remarks
909	<p>Training services – adult education -----</p> <p>Documents pertaining to services offered to adult clientele:</p> <ul style="list-style-type: none"> – enrolment services; – literacy training services; – socioprofessional integration services (SIS); – social integration training services (SFIS); – distance education services; – general education services. 	888*	2	S*	<p>* As long as the student has not received a certification for the service rendered.</p> <p>** Retain reports as stipulated in Rule 123.</p>
	Space reserved for changes or additions				
910	<p>Training services – help programs or measures -----</p> <p>Documents pertaining to help programs and measures from the ministère as well as those developed by the school board:</p> <ul style="list-style-type: none"> – academic upgrading training measures; – manpower development measures; – “Development for Employment” program; – job readiness assistance; – integration into the community – Youth Employment initiatives; – <i>Optra – Option travail</i>; – all other programs or measures. 	888*	6	S**	<p>* Duration of program or of measure.</p> <p>** Retain programs or measures developed by the school board.</p>
	Space reserved for changes or additions				


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900 – TEACHING AND LEARNING SUPERVISION

Rule	Title and Description	A	S-A	IN	Remarks
911	<p>Training services – business services</p> <p>-----</p> <p>Documents pertaining to customized services offered to businesses:</p> <ul style="list-style-type: none"> – training services: needs analysis, service offers, custom training program; – qualification and assessment at hiring; – assessment and establishment of professional competencies. 	888*	6	S**	<p>* Term of contract.</p> <p>** Retain special education programs specific to the school board.</p>
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1000 – ANCILLARY STUDENT SERVICES

Rule	Title and Description	A	S-A	IN	Remarks
1001 	Welcome and francization ----- Documents pertaining to the management of Welcome and francization measures.	999	3	D	
	Space reserved for changes or additions				
1002 	Educational scaffolding measures ----- Documents pertaining to: – summer classes; – home courses; – back-to-school courses; – summary report.	888*	0	S**	* Duration of measure. ** Retain the summary report.
	Space reserved for changes or additions				
1003 	Management of ancillary services ----- Documents pertaining to the management of ancillary services (orientation, psychology, speech therapy, audiology, health and social services, etc.).	999	2	S*	* Retain statistics.
	Space reserved for changes or additions				


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1000 – ANCILLARY STUDENT SERVICES

Rule	Title and Description	A	S-A	IN	Remarks
1004	Consulting services -----  Regional intellectual or physical deficiency support service: – documents produced or sold by the school board; – documents pertaining to scientific personnel training; – identified documents pertaining to school enrolment of students in the region.	999	2	S*	* Retain documents produced by the school board.
	Space reserved for changes or additions				
1005	Sports and socio-cultural activities -----  Documents pertaining to the planning and coordination of the following activities: – calendar; – programs; – reports.	2	0	S*	* Retain activity programs and final reports in Year 1 of each decade.
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1000 – ANCILLARY STUDENT SERVICES

Rule	Title and Description	A	S-A	IN	Remarks
1006 	Documents pertaining to school cafeteria service ----- – documents pertaining to the cafeteria; – menus and price lists.	1	0	S*	* Retain studies and reports on the organization's dietary practices.
	Space reserved for changes or additions				
1007 	Financial support for school attendance and travelling ----- Documents pertaining to financial support for: – boarding; – travelling; – access; – studies.	2	5	D	
	Space reserved for changes or additions				
1008 	Student transportation ----- – documents pertaining to routes and schedules; – transportation requests for activities; – complaints.	2	0	D	
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1000 – ANCILLARY STUDENT SERVICES

Rule	Title and Description	A	S-A	IN	Remarks
1009	Day care: management -----  <ul style="list-style-type: none"> - declaration of professional development days to the MEQ; - attendance register; - activities planning. 	2	5*	D	* 0 for activities planning.
	Space reserved for changes or additions				
1010	Day care: student record -----  <ul style="list-style-type: none"> - attendance register; - registration card; - attendance sheet; - health card; - parental authorization. 	999	3	D	
	Space reserved for changes or additions				

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