

# Comprehensive Records Classification and Retention Schedule

Institutional Planning and Reporting Updated July 1, 2013

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#### **OVERVIEW - LETHBRIDGE COLLEGE RECORDS CLASSIFICATION & RETENTION SCHEDULE**

Contact I	Contact Institutional Planning for the comprehensive schedule.		RETE	RETENTION START TIME		RETENTION	DIS	POSITION	
Code	Record Classification	Master Record Holder	Transaction Complete*	Superceded / Obsolete	Current Fiscal Year	# of Years	Destroy	Archival Selection or Permanent	Refer to Notes
	ction Complete means one or more of th	-							ntry, age
-	rity, termination of employment, closing	•			-	-	greer	ment and	
	ent of all conditions, abolishment of posi	tion, completion of request o	or Com	missio	ner's F	indings.			
	MIC AND INSTRUCTIONAL (0100 -0399)		1	1	1		1	1	
0100 -	General, Departmental Procedures,					0			
0112	Reports and Statistics	Various Departments	x*	х		0	X		
0130	Academic References	Various Departments				1	X		Noto 1
0135	Academic Advising	Student Services	x* x*			2	X		Note 1
0137	Employment and Career Advising	Student Services	x* x*				х		
0140	Awards and Scholarships	Registrar Academic Centres	x* x*			1		X	
0150	Accreditation		x* x*					X	
0157 0158	Admissions - Applicant Records	Registrar	x* x*			5	X		
0158	Registration	Registrar Applied Research	x*			3	X		Noto 2
0160	Applied Research	CTLI	X			3	X		Note 2
0170	Learning Outcomes Assessment		x*	х			X		Noto 2
		Academic Centres CTLI	X			0	X		Note 3
0176	Testing	-		X		2	х		
0180	Articulation - General	Academic Centres, Registrar, CTLI	x*			10	x		
0180	Articulation - ACAT	Registrar	× x*			10	x		
0181	Course and Curriculum Development	CTLI	~	x		10	^	x	
0190	Program and Curriculum Review	CTLI	x	×		10		x	
0192	Course Outlines	Academic Centres	×	x		25	x	~	
0200	Learning Assistance	CTLI		x		7	^	x	
0210	Distributed Learning	CTLI	x*	^		5	x	^	
0220	Instructional Material	Academic Centres	^	x		0	x		
0235	Credentials	Registrar		x		0	x		
0235	Work-site Based Experience	Academic Centres	x*	^		2	x		
0240	Graduation Eligibility	Registrar	x*			1	x		
0245	Program Approvals, Coordination,	Registrat	~			-	~		
0260	Planning	VPA & COO		х		10		x	
0270	Program Initiatives	Academic Centres	x*			10	х		
		Academic Centres,				-			
0340	Student Issues	Student Services	x*					x	
	Academic Reviews, Appeals,	Registrar, VPA/COO,							
0341	Discipline	Student Services							Note 4
0342	Student Records	Registrar, Student Services	x*			2		х	Note 5
	Student Recruitment, Orientation and								
0360	Retention	Registrar, Student Services	x*			1	х		
0370	Teaching and Evaluation	Academic Centres, CTLI		х			х		
0375	Timetabling/Scheduling	Registrar	x*			2	х		Note 6
0380	Employer Recruitment Services	Student Services	x*			5	х		
0385	Learning Resources	CTLI		х		5	х		
	STRATION (0400 - 0699)			-		1			
0400 -	General, Departmental Procedures,								
0412	Reports and Statistics	Various Departments		х		0	х		
0420	Acts and Legislation - General	President's Office		х		5	х		
0422	Acts and Legislation - Copyright	CTLI	x*			10	х		
0424	Intellectual Property Management	CTLI	x*			10	х		

Contact Institutional Planning for the comprehensive schedule.		RETE	RETENTION START TIME		RETENTION	DISPOSITION			
Code	Record Classification	Master Record Holder	Transaction Complete*		Current Fiscal Year	# of Years	Destroy	Archival Selection or Permanent	Refer to Notes
*Transa	ction Complete means one or more of th	e following retention start ti	mes: e		vent,	last contact,	date	e of last er	ntry, age
	rity, termination of employment, closing	-							<i>µ</i> 0
_	ent of all conditions, abolishment of posi	-		-	-		-		
0430	Contracts and Agreements	Various Departments	х*			10	х		
	Appreciation, Complaints and								
0450	Concerns	Various Departments	x*			2	х		
0470 -	Associations, Clubs, Memberships								
0475	series	Various Departments	x*			3	х		
0490 -	Awards, Ceremonies, Celebrations								
0492	series	Various Departments	x*			3		х	
0500	Board of Governors	President's Office	x*			3		х	
0510	College-wide Policy and Procedures	Institutional Planning		Х		0		х	
0530									
and			*			-			
0537	Committees and Meetings series	Various Departments	x*			5	х		
0535	Committees and Meetings - Academic Council	Registrar	x*			5		×	
0535	Insurance	Institutional Planning	^			5		X	Note 7
0550	Legal Matters	Senior Administration, HR		x		10	x		NOLE 7
0570 -		Senior Administration, Inc		^		10	<u>^</u>		
0579	Liaison series	Various Departments	x*			3		x	
0590	Licenses, Permits and Registrations	Various Departments	x*			10	х	~	
0610	Organization and Mandate	HR, President's Office	~	х		5	x		
0630	Planning and Evaluation	Senior Administration		X		5	~	x	
0640	Risk Management	IPR / departments		X		1	х		
	Signing and Decision Making	,							
0650	Authority	Various Departments		х		7	х		
0670	Travel and Accommodation	Various Departments	x*			1	х		
BUILDIN	IGS AND PROPERTIES (0700 - 0899)	· · · · · · · · · · · · · · · · · · ·							
0700 -	General, Departmental Procedures,								
0710	Reports and Statistics	Facilities Management		х		0	х		
0730	Campus Planning	Facilities Management		х		0		х	
0750	Construction	Facilities Management		х		0	х		
0780	Equipment	Facilities Management		х		0	х		
0790	Maintenance and Repairs	Facilities Management	х*			10	х		
	Occupational Health and Safety -		1						
0810	Buildings and Properties	Facilities Management		х		0	х		
0830	Parking and Traffic Management	Facilities Management		Х		0	х		
0850	Renovations	Facilities Management	<u> </u>	X		0	Х		
0860	Property Management	Facilities Management		X		0	X		
0890	Vehicle Management	Facilities Management		Х		10	Х		
EMPLOY 0900 -	(EE RELATIONS (0900 - 1199)								
0900 - 0910	General, Departmental Procedures, Reports and Statistics	Various Departments	1	x		0	x		
0910	Classification - General	HR		x		5	x		
0952	Classification - Position Descriptions	HR	x*	^		3	x		
0952	Classification - Evaluation	HR	^ X*			3	x		
0990	Employee Records - General	HR	 X*			7	x		
0000	Employee Records – Compensation					,	^		
0992	/Benefits	Financial Services	x*			7	x		
1020	Labour Groups - General	HR	1	х		3	x		
-		1				-		1	

Contact Institutional Planning for the comprehensive schedule.			RETENTION START TIME			RETENTION	DIS	POSITION	
Code	Record Classification	Master Record Holder	Transaction Complete*	Superceded / Obsolete	Current Fiscal Year	# of Years	Destroy	Archival Selection or Permanent	Refer to Notes
	ction Complete means one or more of th	-							ntry, age
-	rity, termination of employment, closing	-		-	-	-	greer	nent and	
	ent of all conditions, abolishment of posi		or Com	1	ner's F	-			
1025	Labour Groups - Negotiations	HR		х		10	х		
1030	Labour Groups - Collective Agreements	HR		x		10		v	
1030	Labour Groups - Grievances	HR		x		10	х	X	
1035 -				^		10	^		
1040	Occupational Health and Safety series	HR		х		3	х		
1050	Orientation - Employee	HR, CTLI		X		3	x		
1060	Payroll	Financial Services			х	6	х		
1080	Recruitment - Employee - General	HR	x*			1	х		
	Recruitment - Employee -								
1082	Competitions	HR	x*			1	х		
1100	Salary Administration	HR	x*			3	х		
	Social Events, Recreation and								
1140	Recognition Programs	HR		Х		3		х	
1160	Workforce Planning	HR		х		3	х		
1162	Staffing Programs	HR	х*			3	х		
1100	Training and Professional		x*			2			
1180	Development - General Training and Professional	HR	X			3	х		
	Development - Instructional								
1182	Certificate Program	HR		x		3	x		
-	AL MANAGEMENT (1200 - 1499)		L	~	<b></b>	3	^		
1200 -	General, Departmental Procedures,		Ι	[	1				
1210	Reports and Statistics	Various Departments		х		0	х		
1230	Accounts Payable	Financial Services			х	6	х		
1250	Accounts Receivable	Financial Services			х	6	х		Note 8
1280	Agency/Trust	Financial Services			х	6	х		
1300	Audit	Financial Services			х	6	х		
1320	Banking	Financial Services			х	6	х		
1340	Budgets	Financial Services			х	6	х		Note 9
1380	Funding	Financial Services			х	6	х		
1400	General Accounting	Financial Services			х	6	х		Note 10
1430	Internal Controls	Financial Services			х	6	х		
1440	Investments	Financial Services			X	6	X		Nata 11
1450 1495	Procurement Management Student Financial Aid	Financial Services	x*		х	6 2	x		Note 11 Note 12
	<b>IATION (1500 - 1699)</b>	Registrar	<u>x</u> .	L			х	l	NOLE 12
1500 -			Γ						
1505	General, Departmental Procedures	Various Departments		x		0	x		
1510	Reports and Statistics - Information	Various Departments		X		5	Х		
1530	Archives	Institutional Planning	L	Х		3		х	
1552	Postal and Courier Services	Financial Services			х	6	х		
	Freedom of Information and								
1570	Protection of Privacy - General	Institutional Planning		х		2	х		
	Freedom of Information and								
4575	Protection of Privacy - Requests and					-			
1575	Responses	Institutional Planning	x*			5	X		Note 12
1630	Records Management	Institutional Planning	I	х		10	х		Note 13

Contact	Contact Institutional Planning for the comprehensive schedule.		RETE	RETENTION START TIME		RETENTION	DISPOSITION		
Code	Record Classification	Master Record Holder	Transaction Complete*	Superceded / Obsolete	Current Fiscal Year	# of Years	Destroy	Archival Selection or Permanent	Refer to Notes
	ction Complete means one or more of t	-							ntry, age
	rity, termination of employment, closing			-	-		greer	ment and	
	ent of all conditions, abolishment of pos		or Com	missio	ner's I	indings.			
	AND COMMUNITY RELATIONS (1700 - 1	999)	Т	1	1			1	
1700 -	General, Departmental Procedures,					0			
1710	Reports and Statistics	Various Departments		X		0	Х		
1730	Advertising and Web Services	Advancement		X		2	х		
1740	Alumni Relations	Advancement		X		2		X	
1750	Campaigns and Canvassing	Advancement		X		5		x	
1770	College Visual Identity	Advancement		X		5		x	
1790	Development - General	Advancement		X		3	х		
1795	Development - Fund-raising	Advancement		X		6		X	
1830	Media Relations	Advancement		X		2		x	
1870	Photographs and Images	Various Departments	*	X		5		X	
1890	Presentations	Various Departments	X*			2		X	
1910	Promotions and Events	Various Departments	x*			2		x	
1940	Protocol	President's Office		X		5	Х		
1960	Publications - Internal	Advancement	*	х		5		x	
1980	Tours and Visitors	Various Departments	х*			2	Х		
	ES (2000 - 2599)			1	1		1		
2000 -	General, Departmental Procedures,					0			
2010	Reports and Statistics	Various Departments		Х		0	Х		
2030	Bookstore	Financial Services	*		Х	6	Х		
2060	Daycare	Student Services	X*			7	Х		
2090	Food Services	CAM	x* x*			7	X		
2120	Residence	Student Services	X			/	х		
2100	Physical Education Building	Student Services	x*			2	v		
2180 2260	Operations Athletics	Student Services Student Services	x*			2	х	×	
2280	Audio Visual Support	CTLI	X	~		3	v.	X	
2280		ITS	+	X		3	X		
2340	Information Technology Health Services	Student Services	x*	X		3 10	X		
2390	Security	HR	X.			10	x		
2500	Chaplaincy Services	Student Services	x*	х		10	x x		
2555	Counselling	Student Services	x*			10			
2557	Technology Integration	CTLI	x*			10	x		
2570			X		1	10	Х		

#### NOTES

Note 1	Academic References 130 - Academic Success Plans: Transaction Complete, 1 year, Destroy
Note 2	Applied Research 160 - Externally funded research records and strategic plans: Archive
Note 3	Assessment 175 – Assignments and exams be kept by instructors to satisfy the Grading Policy/ Grade Appeal Procedures
	then securely destroyed.
Note 4	Academic Reviews, Appeals, Discipline 341 - 5 years from the time the disciplinary action or student appeal is finalized except in cases where there are extenuating circumstances, in which case the vice president responsible for maintaining the records will include in the record a written justification supporting the extenuating circumstances as well as how long the record will be retained. If there is a specific request from a student for expunging a record before 5 years has elapsed, the request could be considered by the appropriate vice president based upon merits of that case.
Note 5	Student Records 342 - Transcripts retained permanently.
Note 6	<b>Timetabling/Scheduling 375</b> - Paper records are retained 2 years, Destroy. All activities are booked in the Enterprise Facility Booking system and as such become a permanent electronic record.

Note 7	<b>Insurance 540</b> - Claims, Certificates of Insurance, Driver Authorization, Waivers: Settlement of Claim, 10 years, Destroy. Policies: Superceded/Obsolete, 30 years, Destroy. WCB Confirmation Letters: 3 years, Destroy. International Travel:
	Transaction Complete, 5 years, Destroy.
Note 8	Accounts Receivable 1250 - Year-end retained permanently
Note 9	Budgets 1340 - General budget documents are retained 1 year active retention, 1 year semi active, and then destroy.
Note 10	General Accounting 1400 - Detailed transaction listings retained permanently.
Note 11	Procurement Management 1450 - Records related to construction RFP's and RFQ's retained for 10 years
Note 12	Student Financial Aid 1495 - Alberta Works records are retained until Alberta Human Services policy indicates; then files and
	lists are sent to the Government
Note 13	Records Management 1630 - Retention schedules and certificates of destruction retained permanently

### **Comprehensive Records Classification and Retention Schedule**

#### ACADEMIC AND INSTRUCTIONAL (0100 -0399)

0100 GENERAL - ACADEMIC AND INSTRUCTIONAL Records about general academic and instructional subjects not included elsewhere in this block.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Superceded/Obsolete, Destroy

#### 0105 DEPARTMENTAL PROCEDURES - ACADEMIC AND INSTRUCTIONAL

Internal operational guidelines and practices that provide direction to employees. These records consist of correspondence, procedures manuals and guidelines, but not official College policy.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Superceded/Obsolete, DestroyCROSS REFERENCE:For approved College policies see 0510 College-wide Policy and Procedure

#### 0110 REPORTS AND STATISTICS - ACADEMIC AND INSTRUCTIONAL

Includes academic and instructional related reports and statistics. DOES NOT INCLUDE reports and statistics generated out of Enrolment Management and Learner Services.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Superceded/Obsolete, DestroyCROSS REFERENCE:See 0112 Reports and Statistics - Academic and Instructional – Enrolment

#### 0112 REPORTS AND STATISTICS - ACADEMIC AND INSTRUCTIONAL - ENROLMENT

Includes reports and statistics on student enrolments, quotas, and related correspondence.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Superceded/Obsolete, Destroy

#### 0130 ACADEMIC REFERENCES

To document letters of academic reference written for faculty or students. May include letters of support for research projects, or correspondence related to nominations for academic/research awards.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Transaction Complete\*, 1 year, Destroy

#### 0135 ACADEMIC ADVISING

To document academic program, course, transfer, Lethbridge College policy advice for students and to document student readmission and progress after being academically disqualified, as done by academic advisors.

MASTER RECORD HOLDER:Student ServicesRETENTION:Academic Success Plans: Transaction Complete\*, 1 year, Destroy. Remaining records:<br/>Transaction Complete\*, 2 years, Destroy

#### 0137 EMPLOYMENT AND CAREER ADVISING

Includes records related to employment and career advising.

MASTER RECORD HOLDER:Student ServicesRETENTION:Transaction Complete\*, 2 years, Destroy

#### 0140 AWARDS AND SCHOLARSHIPS

Records about awards and scholarships, including applications, selected recipients, terms of reference and criteria for awards and scholarships and related documentation.

MASTER RECORD HOLDER:RegistrarRETENTION:Application related records: Transaction Complete\*, 1 year, Destroy; Selected recipient<br/>records – Archive

#### 0150 ACCREDITATION

To document the accreditation process for academic programs. Includes course curriculum and outlines, correspondence, accreditation applications, reports, etc.

MASTER RECORD HOLDER:Academic CentresRETENTION:Transaction Complete\*, Archival Selection

#### 0157 ADMISSIONS - APPLICANT RECORDS

Individual applicant records including information on applicants applying for admission into post-secondary programs. Information on the application form includes the applicant's address, educational background, biographical information of marital status, citizenship status, sex and first language spoken. Documents vary according to the academic program and could include transcripts (high school and/or post-secondary), background/research letters or essays, TOEFL scores, letters of acceptance, testing results, and interview comments. Depending on status of application, file may include offer of admission, letter of acceptance and overdue notice or refusal letter.

MASTER RECORD HOLDER:RegistrarRETENTION:Transaction Complete\*, 5 years, Destroy

#### 0158 REGISTRATION

Includes records related to registration transaction functions - registration form/receipt, withdrawal form, sponsorship documentation, cancel/confirm course phoning lists, waitlists for non-credit courses, and miscellaneous fee transactions.

MASTER RECORD HOLDER:RegistrarRETENTION:Transaction Complete\*, 1 year, Destroy

#### 0160 APPLIED RESEARCH

Records related to applied research.

MASTER RECORD HOLDER:Applied ResearchRETENTION:Externally funded research records and strategic plans: Archive; remainder of records:<br/>Transaction Complete\*, 3 years, Destroy

#### 0170 LEARNING OUTCOMES

Includes records and documentation for student learning at the college-wide, program and course levels.

MASTER RECORD HOLDER:Centre for Teaching, Learning and InnovationRETENTION:Superceded/Obsolete, 2 years, Destroy

#### 0175 ASSESSMENT

Records about academic assessment for the purpose of documenting the processes, procedures and administration necessary for assessment of students' previous and current education and work experience, including Prior Learning Assessment.

MASTER RECORD HOLDER:Academic CentresRETENTION:Assignments and exams kept by instructors to satisfy the Grading Policy/Grade Appeal<br/>Procedures then destroyed.

#### 0176 TESTING

Records about placement testing including standardized assessment.

MASTER RECORD HOLDER:Centre for Teaching, Learning and InnovationRETENTION:Superceded/Obsolete, 2 years, Destroy

#### 0180 ARTICULATION - GENERAL

Includes records on articulation such as dual credit. DOES NOT INCLUDE ACAT.

MASTER RECORD HOLDER:Academic Centres, Centre for Teaching, Learning and Innovation, RegistrarRETENTION:Transaction Complete\*, 10 years, DestroyCROSS REFERENCE:See 0181 Articulation – ACAT

#### 0181 ARTICULATION - ACAT

Includes records related to articulation with Alberta Council on Admissions and Transfer (ACAT).

MASTER RECORD HOLDER:RegistrarRETENTION:Transaction Complete\*, 1 year, Destroy

#### 0190 COURSE AND CURRICULUM DEVELOPMENT

Includes guidelines for course and curriculum development, instructor manual and correspondence. To document curriculum development and review. Records may include course proposals, planning documents, correspondence, curriculum manuals and outlines, course syllabi, course study guides and related documentation. Includes distance course development.

MASTER RECORD HOLDER:Centre for Teaching, Learning & InnovationRETENTION:Superceded/Obsolete, 10 years, Archival Selection

#### 0192 PROGRAM AND CURRICULUM REVIEW

Records about the evaluation of programs of study offered at Lethbridge College. This includes program review surveys and results.

MASTER RECORD HOLDER:Centre for Teaching, Learning & InnovationRETENTION:Transaction Complete\*, 10 years, Archival Selection

#### 0200 COURSE OUTLINES

To document the contract between the student and the instructor. The course outline is the first official document that the instructor provides to students in the class and provides students with a map of the course. The course outline defines for the learner the broad goals and specific objectives of the course and informs the learner as to how he or she will be evaluated.

MASTER RECORD HOLDER:Academic CentresRETENTION:Superceded/Obsolete, 25 years Destroy

#### 0210 LEARNING ASSISTANCE

Records related learning assistance including records special needs students and sponsored students.

MASTER RECORD HOLDER:Centre for Teaching, Learning & InnovationRETENTION:Superceded/Obsolete, 7 years, Archival Selection

#### 0220 DISTRIBUTED LEARNING

Records related to distributed learning.

MASTER RECORD HOLDER:Centre for Teaching, Learning & InnovationRETENTION:Transaction Complete\*, 5 years, Destroy

#### 0230 INSTRUCTIONAL MATERIAL

Includes instructional materials that support teaching/learning opportunities.

MASTER RECORD HOLDER:Academic CentresRETENTION:Superceded/Obsolete, Destroy

#### 0235 CREDENTIALS

Records related to the creation and issuing of parchments.

MASTER RECORD HOLDER:RegistrarRETENTION:Superceded/Obsolete, Destroy

#### 0240 WORK-SITE BASED EXPERIENCE

To document student participation during work-site based experience, including apprenticeship, service learning, cooperative studies, directed field studies, experiential learning, practicum / fieldwork / work experience and preceptorship.

MASTER RECORD HOLDER:Academic CentresRETENTION:Transaction Complete\*, 2 years, Destroy

#### 0245 GRADUATION ELIGIBILITY

To document student graduation, including records relating to student graduation eligibility. Records may include application to graduate, graduation application database, transcripts, copies of certificates required for graduation and related documentation and correspondence. DOES NOT INCLUDE records related to the Convocation ceremony.

MASTER RECORD HOLDER:	Registrar
RETENTION:	Transaction Complete*, 1 year, Destroy
CROSS REFERENCE:	See 0492 Awards, Ceremonies and Celebrations – Convocation

#### 0260 PROGRAM APPROVAL, COORDINATION AND PLANNING

To document the approval of new academic programs, the approval of program suspensions, etc. Records may include approval letters from the Alberta government stating the conditions of approval, interim program reports, budget information, etc.

MASTER RECORD HOLDER:Office of the Vice President Academic & Chief Operating OfficerRETENTION:Superceded/Obsolete, 10 years, Archival Selection

#### 0270 PROGRAM INITIATIVES

To document the development of new academic programs. Records may include program proposals and accompanying documentation. Includes records relating to the development of new programs. Includes planning, new program proposals, funding requirements, letters of intent and final program approval. (Includes Access funding proposals).

MASTER RECORD HOLDER:Academic CentresRETENTION:Transaction Complete\*, 10 years, Destroy

#### 0340 STUDENT ISSUES

To document concerns about an individual student. Records may include documentation of issues, correspondence with counsellors, and other records documenting solutions.

MASTER RECORD HOLDER:Academic Centres, Student ServicesRETENTION:Transaction Complete\*, Permanent

#### 0341 ACADEMIC REVIEWS, APPEALS AND DISCIPLINE

Records relating to academic reviews, appeals and discipline. To document the process of student academic review and appeal and the process of academic and non-academic misconduct review following student suspension. Records may include incidence reports, letters of appeal, appeal applications, notes, reports, committee decisions and related documentation and correspondence.

MASTER RECORD HOLDER:Student Services, Office of the Vice President Academic & Chief Operating Officer,RETENTION:5 years from the time the disciplinary action or student appeal is finalized except in<br/>cases where there are extenuating circumstances, in which case the vice president<br/>responsible for maintaining the records will include in the record a written justification<br/>supporting the extenuating circumstances as well as how long the record will be<br/>retained. If there is a specific request from a student for expunging a record before 5<br/>years has elapsed, the request could be considered by the appropriate VP based upon<br/>merits of that case.

#### 0342 STUDENT RECORDS

Includes records related to the student transcript/permanent record in the form of grades submitted on rosters, grade change, academic credits earned from other sources, and records related to the graduation review/eligibility process.

MASTER RECORD HOLDER:RegistrarRETENTION:Transaction Complete\*, 2 years, Archival Selection. Note: transcripts retained

#### 0360 STUDENT RECRUITMENT, ORIENTATION AND RETENTION

Includes records related to recruitment, orientation and retention of students.

MASTER RECORD HOLDER:Registrar, Student ServicesRETENTION:Transaction Complete\*, 1 year, Destroy

#### 0370 TEACHING AND EVALUATION

To document the gathering of information for the purposes of teaching evaluation; and to document the development of policies and procedures regarding teaching evaluation. Records include evaluation tools, student opinion surveys and other questionnaires. DOES NOT INCLUDE individual instructor evaluations.

MASTER RECORD HOLDER:	Academic Centres, Centre for Teaching, Learning and Innovation
RETENTION:	Superceded/Obsolete, Destroy
CROSS REFERENCE:	See 0990 Employee Records

#### 0375 TIMETABLING / SCHEDULING

Information regarding the creation of course records (credit, non-credit, supplemental credit), the academic timetable, exam schedule, and ad hoc bookings (internal and external).

MASTER RECORD HOLDER:RegistrarRETENTION:Transaction Complete, 2 years, Destroy; all activities are booked in the Enterprise<br/>Facility Booking system and as such become a permanent electronic record.

#### 0380 EMPLOYER RECRUITMENT SERVICES

Records related to the employment opportunities available to Lethbridge College students, such as on-campus advertising of jobs, pre-screening service of student applications and resumes, interviews and job creation programs.

MASTER RECORD HOLDER:Student ServicesRETENTION:Transaction Complete\*, 5 years, Destroy

#### 0385 LEARNING RESOURCES

Includes general information on library resources, public performance rights documentation, as well as records related to the information/reference function of the library.

MASTER RECORD HOLDER:Centre for Teaching, Learning & InnovationRETENTION:Superceded/Obsolete, 5 years, Destroy

#### ADMINISTRATION (0400 - 0699)

0400 GENERAL - ADMINISTRATION Records about general administration subjects not included elsewhere in this block.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Superceded/Obsolete, Destroy

#### 0405 DEPARTMENTAL PROCEDURES - ADMINISTRATION

Internal operational guidelines and practices that provide direction to employees. These records consist of correspondence, procedures manuals and guidelines, but not official College policy.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Superceded/Obsolete, DestroyCROSS REFERENCE:For approved College policies see 0510 College-wide Policy and Procedures

#### 0410 REPORTS AND STATISTICS - ADMINISTRATION

Records about management reports and statistics at both the departmental and institutional levels. These pertain to the monitoring functions of management. Includes the final Lethbridge College annual reports prepared from submissions from the academic and non-academic program areas, ancillary services and college service departments. Includes reporting to outside agencies such as Statistics Canada. DOES NOT INCLUDE reporting to the Alberta government.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Superceded/Obsolete, Destroy

#### 0412 REPORTS AND STATISTICS - ALBERTA GOVERNMENT

Reports and statistics pertaining to the Alberta government, including Status Reports, Key Performance Indicator (KPI) reporting and Common Information System (CIS) reporting as well as other required reporting.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Superceded/Obsolete, Destroy

#### 0420 ACTS AND LEGISLATION - GENERAL

Includes Orders-in-Council, board rosters, correspondence and reports related to acts and legislation which could influence or impact college and board operations.

MASTER RECORD HOLDER:	President's Office
RETENTION:	Superceded/Obsolete, 5 years, Destroy
CROSS REFERENCE:	See 0422 Acts and Legislation – Copyright

#### 0422 ACTS AND LEGISLATION - COPYRIGHT

Includes records pertaining to copyright permissions, agreements and related transactions.

MASTER RECORD HOLDER:Centre for Teaching, Learning & InnovationRETENTION:Transaction Complete\*, 10 years, Destroy

#### 0424 INTELLECTUAL PROPERTY MANAGEMENT

Includes records pertaining to the management of intellectual property including guidelines, correspondence, research reports, descriptions of creations and inventions, contracts and other relevant agreements.

MASTER RECORD HOLDER:Centre for Teaching, Learning and InnovationRETENTION:Transaction Complete\*, 10 years, Destroy

#### 0430 CONTRACTS AND AGREEMENTS

Includes contracts and agreements and related documentation. DOES NOT INCLUDE Articulation Agreements.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Expiry of contract or agreement and satisfaction of all conditions, 10 years, DestroyCROSS REFERENCE:See 0180 Articulation – General

#### 0450 APPRECIATION, COMPLAINTS AND CONCERNS

Includes records related to appreciation, complaints and concerns received by the College from external parties.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Transaction Complete\*, 2 years, Destroy

#### 0470 ASSOCIATIONS, CLUBS, MEMBERSHIPS - EXTERNAL

The College's participation in the functions of recognized outside organizations for reasons of mutual professional interest, individual or corporate membership or board membership. Includes proceedings, correspondence, minutes, annual reports, financial statements, membership and fees, etc. relating to associations, clubs, centres, authorities, agencies, consortiums, federations, foundations, leagues, orders, societies and other similar organizations which are external to LC.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Superceded/Obsolete, 3 years, Destroy

#### 0475 ASSOCIATIONS, CLUBS, MEMBERSHIPS - INTERNAL

The College's participation in the functions of recognized internal organizations for reasons of mutual professional interest, individual or corporate membership or board membership. Includes proceedings, correspondence, minutes, annual reports, financial statements, membership and fees, etc. relating to associations, clubs, centres and other similar organizations which are internal to Lethbridge College.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Superceded/Obsolete, 3 years, Destroy

#### 0490 AWARDS, CEREMONIES AND CELEBRATIONS - GENERAL

Development and participation in celebrations, awards and ceremonies sponsored by the College such as Hall of Fame, Honorary Diploma, Community Volunteer Awards, and Student Awards Ceremony. DOES NOT INCLUDE employee recognition, Convocation or Distinguished Alumni Award.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Transaction Complete\*, 3 years, Archival Selection

#### 0492 AWARDS, CEREMONIES AND CELEBRATIONS - CONVOCATION

Includes records relating to the convocation of Lethbridge College students. Includes individual program convocations such as Nursing and the rural campuses.

MASTER RECORD HOLDER:Office of the Vice President Academic & Chief Operating Officer, RegistrarRETENTION:Transaction Complete\*, 3 years, Archival Selection

#### 0500 BOARD OF GOVERNORS

Records of Board of Governors meetings, resolutions, reports, bylaws, orientation, etc. Includes board and committee meeting agenda packages in digital format.

MASTER RECORD HOLDER:President's OfficeRETENTION:Transaction Complete, 3 years, Archival Selection

#### 0510 COLLEGE -WIDE POLICY AND PROCEDURE

Includes official College policy and information relating to same. Includes developmental material leading to an official College policy. Does not include internal operational guidelines and practices that provide direction to staff.

MASTER RECORD HOLDER:Institutional Planning & ReportingRETENTION:Superceded/Obsolete, Archival Selection

#### 0530 COMMITTEES AND MEETINGS - INTERNAL

Includes records about internal Lethbridge College committees, task forces, subcommittees, groups of various levels in the college environment. These committees may have external members and the focus of the committee is related to LC's mandate and of an internal nature. This classification includes college-wide and campus-specific committees. Includes minutes, agendas, reports, and related documentation. Includes advisory committees. DOES NOT INCLUDE Professional Development Committees or Academic Council.

MASTER RECORD HOLDER: RETENTION:	Various Departments Transaction Complete*, 5 years, Destroy
CROSS REFERENCE:	See 1180 Training and Professional Development - General and
	0535 Committees and Meetings - Internal - Academic Council

#### 0535 COMMITTEES AND MEETINGS - INTERNAL - ACADEMIC COUNCIL

Includes agendas, minutes, constitution, bylaws, and general information on Academic Council and Academic Council Orientation.

MASTER RECORD HOLDER:RegistrarRETENTION:Transaction Complete\*, 5 years, Archive

#### 0537 COMMITTEES AND MEETINGS - EXTERNAL

Records about external committees and meetings which employees of Lethbridge College join outside the college. External committees may have mandates beyond those of LC and the focus of the committee is external to LC. Includes minutes, agendas, reports, etc.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Transaction Complete\*, 5 years, Destroy

#### 0540 INSURANCE

Includes records related to insurance and programs, policy information and updates, inquiries on coverage, certificates of insurance, bonds and bonding, waivers, assets and property evaluations, claims and other insurance matters.

MASTER RECORD HOLDER:Institutional Planning & ReportingRETENTION:Claims, Certificates of Insurance, Driver Authorization, Waivers: Settlement of claim, 10years, Destroy. Policies: Superceded/Obsolete, 30 years, Destroy. International Travel:<br/>Transaction Complete, 5 years, Destroy. WCB confirmation letters: Transaction<br/>Complete\*, 3 years, Destroy

#### 0550 LEGAL MATTERS

Records about legal subjects, legal cases, fees and policies. Includes records about court cases and the resulting documentation. Records may include correspondence relating to the administration of legal matters, rulings, patents, copyrights, opinions and decisions. Includes information on Commissioners for Oaths and Affidavits.

MASTER RECORD HOLDER:Senior Administration, HRRETENTION:Superceded/Obsolete, 10 years, Destroy

#### 0570 LIAISON - GENERAL

Records relating to the services provided by and received from national, provincial and municipal government departments, branches and agencies, other organizations and interest groups not covered elsewhere in this series.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Transaction Complete\*, 3 years, Archival Selection

#### 0572 LIAISON - ENTERPRISE AND ADVANCED EDUCATION

Records relating to the exchange of information by Lethbridge College with Enterprise and Advanced Education and affiliated bodies or agencies, e.g. annual reports, program brochures, announcements, etc. Includes Common Information Systems Committee, and the KPI Committee, BUT not the reporting.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Transaction Complete\*, 3 years, Archival Selection

#### 0575 LIAISON - EDUCATIONAL INSTITUTIONS

Records about liaison with educational institutions other than Lethbridge College. Includes individual schools, school boards, post-secondary educational institutions and educational consortia. Information regarding program transfers between LC and Alberta post-secondary institutions including transfer details, contact names and addresses. Includes billing records, exams, forms, student demographics, registrations, correspondence, etc.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Transaction Complete\*, 3 years, Archival Selection

#### 0577 LIAISON - PRIVATE SECTOR

Records about liaison with non-government and non-educational organizations such as companies, non-profit societies, etc.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Transaction Complete\*, 3 years, Archival Selection

#### 0579 LIAISON - PUBLIC SECTOR

Records about services provided by and received from federal, provincial, territorial and municipal government departments, branches and agencies, reports on activities, etc.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Transaction Complete\*, 3 years, Archival Selection

#### 0590 LICENSES, PERMITS AND REGISTRATIONS

Includes copies of licenses and permits as well as correspondence relating to same. Examples are Alberta Liquor Control Board licensing, Copyright licensing, Daycare licensing, etc. Includes a licenses and permits electronic registry. Includes vehicle licensing and software licensing. Includes documentation on warranties and guarantees.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Transaction Complete\*, 10 years, Destroy

#### 0610 ORGANIZATION AND MANDATE

Records about the organizational framework at Lethbridge College. Includes reorganization, function charts, departmental functions and relationships. Includes mandate statement, mission statement and statement of values, as well as correspondence regarding and documentation approving same. Records about institutional and departmental structural changes and developments, the development of broad missions and goals, organization charts, functional and service relationships.

MASTER RECORD HOLDER:Human Resources, President's OfficeRETENTION:Superceded/Obsolete, 5 years, Destroy

#### 0630 PLANNING AND EVALUATION

Records about institutional analysis and planning. Includes Institutional, Centre, Ancillary Services and College Services Business Plans and related documentation. Includes institutional and departmental goals and objectives, and documentation of review of progress toward goals.

MASTER RECORD HOLDER:Senior AdministrationRETENTION:Superceded/Obsolete, 5 years, Archival Selection

#### 0640 RISK MANAGEMENT

Includes records related to risk management such as enterprise risk management, risk reporting, emergency management planning, risk assessments, Risk Management Advisory Committee, threat assessment, and other risk management related matters.

MASTER RECORD HOLDER:Institutional Planning, Various DepartmentsRETENTION:Superceded/Obsolete, 1 year, Destroy

#### 0650 SIGNING AND DECISION MAKING AUTHORITY

Delegation of signing authority for correspondence, financial and personnel matters, including appointment announcements, acting appointments including holiday cover offs.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Superceded/Obsolete, 7 years, Destroy

#### 0670 TRAVEL AND ACCOMMODATION

Records related to travel and accommodation while on College business.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Transaction Complete\*, 1 year, Destroy

#### **BUILDINGS AND PROPERTIES (0700 - 0899)**

0700 GENERAL - BUILDINGS AND PROPERTIES Records about Lethbridge College facilities and the physical plant not covered elsewhere in this block.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Superceded/Obsolete, Destroy

#### 0705 DEPARTMENTAL PROCEDURES - BUILDINGS AND PROPERTIES

Internal operational guidelines and practices that provide direction to employees. These records consist of correspondence, procedures manuals and guidelines, but not official College policy.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Superceded/Obsolete, DestroyCROSS REFERENCE:For official College policies see 0510 College-wide Policy and Procedure

#### 0710 REPORTS AND STATISTICS - BUILDINGS AND PROPERTIES

Includes records relating to physical plant and maintenance systems. Includes reports generated to facilitate, support, summarize and maintain a historic/ongoing cumulative record within the physical plant and maintenance system.

MASTER RECORD HOLDER:Facilities ManagementRETENTION:Superceded/Obsolete, Destroy

#### 0730 CAMPUS PLANNING

Records about long range campus facilities and renovation planning. Includes design of specific projects, architect plans, and campus expansion. Includes records on space allocation.

MASTER RECORD HOLDER:Facilities ManagementRETENTION:Superceded/Obsolete, Archival Selection

#### 0750 CONSTRUCTION

Records about planning, design or LC buildings, facilities, and structures. Includes capital projects files.

MASTER RECORD HOLDER:Facilities ManagementRETENTION:Superceded/Obsolete, Destroy

#### 0780 EQUIPMENT

Records related to equipment.

MASTER RECORD HOLDER:Facilities ManagementRETENTION:Superceded/Obsolete, Destroy

#### 0790 MAINTENANCE AND REPAIRS

Records about regular management of Lethbridge College buildings. This includes repairs, janitorial services, and maintenance of carpets and furnishings. Includes work orders.

MASTER RECORD HOLDER:Facilities ManagementRETENTION:Transaction Complete\*, 10 years, Destroy

#### 0810 OCCUPATIONAL HEALTH AND SAFETY - BUILDINGS AND PROPERTIES

Records about health and safety. Includes records on hazardous wastes, safety inspections, safety supplies and uniforms and OH&S partnership, I.A.Q.

MASTER RECORD HOLDER:Facilities ManagementRETENTION:Superceded/Obsolete, Destroy

#### 0830 PARKING AND TRAFFIC MANAGEMENT

Records about parking management at Lethbridge College. Includes parking lot maintenance, services, and control.

MASTER RECORD HOLDER:Facilities ManagementRETENTION:Superceded/Obsolete, Destroy

#### 0850 RENOVATIONS

Records about planning, design, alteration, and repair of Lethbridge College buildings, facilities, classroom and office space and structures. Includes capital projects files, renovation projects, and public works projects.

MASTER RECORD HOLDER:Facilities ManagementRETENTION:Superceded/Obsolete, Destroy

#### 0860 PROPERTY MANAGEMENT

Includes records pertaining to the management of off-campus property owned by Lethbridge College.

MASTER RECORD HOLDER:Facilities ManagementRETENTION:Superceded/Obsolete, Destroy

#### 0890 VEHICLE MANAGEMENT

Records about vehicle management and maintenance such as gas records, tanks, vehicle listings, oil management, drivers, violation records and vehicle records. DOES NOT INCLUDE vehicle insurance, registration or permits.

MASTER RECORD HOLDER:Facilities ManagementRETENTION:Superceded/Obsolete, 10 years, Destroy

#### **EMPLOYEE RELATIONS (0900 - 1199)**

0900 GENERAL - EMPLOYEE RELATIONS Records on employee relations not included elsewhere in this block.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Superceded/Obsolete, Destroy

#### 0905 DEPARTMENTAL PROCEDURES - EMPLOYEE RELATIONS

Internal operational guidelines and practices that provide direction to employees. These records consist of correspondence, procedures manuals and guidelines, but not official College policy.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Superceded/Obsolete, DestroyCROSS REFERENCE:For official College policies see 0510 College-wide Policy and Procedure

#### 0910 REPORTS AND STATISTICS - EMPLOYEE RELATIONS AND PAYROLL

Includes reports generated by Human Resources and Payroll to facilitate, support, summarize and maintain a historical/ongoing cumulative record within the HR and Payroll system.

MASTER RECORD HOLDER:Human ResourcesRETENTION:Superceded/Obsolete, Destroy

#### 0950 CLASSIFICATION - GENERAL

Records about position classifications at Lethbridge College not included elsewhere in this series.

MASTER RECORD HOLDER:	Human Resources
RETENTION:	Superceded/Obsolete, 5 years, Destroy
CROSS REFERENCE:	See 0952 Classification - Position Descriptions

#### 0952 CLASSIFICATION - POSITION DESCRIPTIONS

Includes position descriptions for Administrative, Faculty, Excluded, and AUPE positions.

MASTER RECORD HOLDER:Human ResourcesRETENTION:Abolishment of position, 3 years, Destroy

#### 0954 CLASSIFICATION - EVALUATION

Includes records related to the function of evaluating the classification of positions.

MASTER RECORD HOLDER:Human ResourcesRETENTION:Abolishment of position, 3 years, Destroy

#### 0990 EMPLOYEE RECORDS - GENERAL

Records about Lethbridge College employees' work history and employability. Includes information on the HRS system. Includes resume, application, letters of appointment, letters of reference, employee information form, transcripts, performance evaluations, merit increments, appreciation letters, grievance letters, discipline letters, Worker's Compensation claims, overtime, sick leave, maternity leave and vacation leave. This is applicable to support staff, excluded staff, administration and faculty records. DOES NOT INCLUDE Employee Records - Compensation Benefits.

MASTER RECORD HOLDER:	Human Resources
RETENTION:	7 years after termination, Destroy
CROSS REFERENCE:	See 0992 Employee Records - Compensation/Benefits

#### 0992 EMPLOYEE RECORDS - COMPENSATION/BENEFITS

Records relating to employee compensation and benefits consisting of hiring letters, increment letters, salary adjustments, severence payments, maternity leave sub plan payments, benefit enrollment/terminations forms, Record of Employments, release documentation, timesheets, absentee forms, birth certificates, marriage certificates, death certificates, name change documentation, garnishees, miscellaneous deduction authorizations, address and telephone number changes, direct deposit authorization, and related documentation regarding salary or benefits, etc.

MASTER RECORD HOLDER:Financial ServicesRETENTION:7 years after termination, Destroy

#### 1020 LABOUR GROUPS - GENERAL

Records about labour groups, including unions and employee associations that do not fit elsewhere in the Labour Group series.

MASTER RECORD HOLDER:Human ResourcesRETENTION:Superceded/Obsolete, 3 years, Destroy

#### 1025 LABOUR GROUPS - NEGOTIATIONS

Records about AUPE and LCFA negotiations.

MASTER RECORD HOLDER:Human ResourcesRETENTION:Superceded/Obsolete, 10 years, Destroy

#### 1030 LABOUR GROUPS - COLLECTIVE AGREEMENTS

Records about approved labour and collective agreements, memoranda of understanding, and protocol developed by labour groups, including unions and employee associations. Includes originally signed agreements.

MASTER RECORD HOLDER:Human ResourcesRETENTION:Superceded/Obsolete, 10 years, Archival Selection

#### 1035 LABOUR GROUPS - GRIEVANCES

Records about grievances and complaints filed by Lethbridge College employees.

MASTER RECORD HOLDER:Human ResourcesRETENTION:Superceded/Obsolete, 10 years, Destroy

#### 1040 OCCUPATIONAL HEALTH AND SAFETY - EMPLOYEE - GENERAL

Records about occupational health and safety at Lethbridge College. This primary includes accident reports and health and safety topical issues, such as WHMIS, smoking in the workplace, etc.

MASTER RECORD HOLDER:Human ResourcesRETENTION:Superceded/Obsolete, 3 years, Destroy

#### 1042 OCCUPATIONAL HEALTH AND SAFETY - EMPLOYEE PROGRAMS

Occupational health and safety programs, such as Workers' Compensation. Includes student accident reports, employee accident reports and related correspondence.

MASTER RECORD HOLDER:Human ResourcesRETENTION:Superceded/Obsolete, 3 years, Destroy

#### 1050 ORIENTATION - EMPLOYEE

Includes records relating to Employee Orientation, including the Instructional Skills Workshop for faculty.

MASTER RECORD HOLDER:Human Resources, Centre for Teaching, Learning & InnovationRETENTION:Superceded/Obsolete, 3 years, Destroy

#### 1060 PAYROLL

Records relating to employee pay, payroll deductions, and pay adjustments. Includes payroll reports, statements, T4 records, balancing sheets, cheques and direct deposit vouchers, year-end processing reports and Revenue Canada information.

MASTER RECORD HOLDER:Financial ServicesRETENTION:Current fiscal year, 6 years, Destroy

#### 1080 RECRUITMENT - EMPLOYEE - GENERAL

Records about the methods employed to recruit candidates for jobs and appointments at LC. Includes unsolicited resumes, postings, government grant programs, etc.

MASTER RECORD HOLDER:Human ResourcesRETENTION:Transaction Complete\*, 1 year, Destroy

#### 1082 RECRUITMENT - EMPLOYEE - COMPETITIONS

Includes position authorization form, employee requisition form, advertisement, resumes, selection documentation.

MASTER RECORD HOLDER:Human ResourcesRETENTION:Closing date of competition, 1 year, Destroy

#### 1100 SALARY ADMINISTRATION

Records about the administration of salary and wage matters. Includes salary scales, surveys, and reviews, as well as records about the Hay system.

MASTER RECORD HOLDER:Human ResourcesRETENTION:Transaction Complete\*, 3 years, Destroy

#### 1140 SOCIAL EVENTS, RECREATION AND RECOGNITION PROGRAM

Records about social events, recreational programs and recognition for the benefit of Lethbridge College employees. Records related to College sponsored programs regarding the recognition of employees such as long service awards and the retirement symposium. May include biographical information on people receiving awards, program booklets, and correspondence.

MASTER RECORD HOLDER:Human ResourcesRETENTION:Superceded/Obsolete, 3 years, Archival Selection

#### 1160 WORKFORCE PLANNING

Records about initiatives and planning with respect to staffing such as workload and records on proposed and approved staffing models, as well as proposals for changes to the organizational structure.

MASTER RECORD HOLDER:Human ResourcesRETENTION:Superceded/Obsolete, 3 years, Destroy

#### 1162 STAFFING PROGRAMS

Employment programs such as cooperative work experience programs offered by the government. Also includes departmental guidelines, applications for employment programs and job sharing.

MASTER RECORD HOLDER:Human ResourcesRETENTION:Transaction Complete\*, 3 years, Destroy

#### 1180 TRAINING AND PROFESSIONAL DEVELOPMENT - GENERAL

Records about staff training events and career development, conferences, workshops, etc. Includes background information on all types of professional development and study leaves. To document participation by College personnel in conferences, courses, workshops and seminars, and the planning and administration of College-sponsored conferences and seminars which are held for the professional development of employees. Includes professional development committees. DOES NOT INCLUDE records on the Instructional Certificate Program (ICP).

MASTER RECORD HOLDER:Human ResourcesRETENTION:Transaction Complete\*, 3 years, DestroyCROSS REFERENCE:See 1182 Training and Professional Development - Instructional Certificate

#### 1182 TRAINING AND PROFESSIONAL DEVELOPMENT - INSTRUCTIONAL CERTIFICATE PROGRAM Includes records pertaining to the Instructional Certificate Program (ICP).

MASTER RECORD HOLDER:Human ResourcesRETENTION:Superceded/Obsolete, 3 years, Destroy

#### FINANCIAL MANAGEMENT (1200 - 1499)

#### 1200 GENERAL - FINANCIAL MANAGEMENT

Includes records relating to financial management subjects not included elsewhere in this block.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Superceded/Obsolete, Destroy

#### 1205 DEPARTMENTAL PROCEDURES - FINANCIAL MANAGEMENT

Internal operational guidelines and practices that provide direction to employees. These records consist of correspondence, procedures manuals and guidelines, but not official College policy.

MASTER RECORD HOLDER:	Various Departments
RETENTION:	Superceded/Obsolete, Destroy
CROSS REFERENCE:	For official College policies see 0510 College-wide Policy and Procedure

#### 1210 REPORTS AND STATISTICS - FINANCIAL MANAGEMENT

Includes records relating to financial reporting systems, financial management reports, statistics and statements. Includes reports generated to facilitate, support, summarize and maintain a historic/ongoing cumulative record within a financial system.

MASTER RECORD HOLDER:Financial ServicesRETENTION:Superceded/Obsolete, Destroy

#### 1230 ACCOUNTS PAYABLE

Includes records related to the accounts payable function, including vendor payment administration.

MASTER RECORD HOLDER:Financial ServicesRETENTION:Current fiscal year, 6 years, Destroy

#### 1250 ACCOUNTS RECEIVABLE

Includes records related to the accounts receivable function, including cash accounting, fees accounting, sponsors, student accounts, tax receipts and year-end.

MASTER RECORD HOLDER:Financial ServicesRETENTION:Current fiscal year, 6 years, Destroy. Year-end records retained permanently.

#### 1280 AGENCY/TRUST

Records related to general finance - agency/trust subjects such as ad hoc funded programs, agricultural programs, Chinook Educational Consortium, endowments and scholarships, fax and Foundation. Also includes records related to expense and revenues of Lethbridge Lifelong Learning Association, Alumni Association, Lethbridge Literacy Awareness Association, Residence Laundry. Includes balance sheets and correspondence.

MASTER RECORD HOLDER:Financial ServicesRETENTION:Current fiscal year, 6 years, Destroy

#### 1300 AUDIT

Includes records on the entrance conference, planning, exit conference, internal correspondence, draft copies of financial statements, legal and bank confirmation letters, correspondence and directives from internal sources and/or Auditor General or the Alberta government. Includes records on the Alumni Audit, Internal Audit, LCSA Audit and system audit.

MASTER RECORD HOLDER:Financial ServicesRETENTION:Current fiscal year, 6 years, Destroy

#### 1320 BANKING

Records related to banking and banking reconciliations.

MASTER RECORD HOLDER:	Financial Services
RETENTION:	Current fiscal year, 6 years, Destroy

#### 1340 BUDGETS

Records about the development and approval of departmental budgets as reported in the financial records system. Budgets are for institutional capital, operating, and construction projects. The budget is amended with approval throughout the course of the fiscal year.

MASTER RECORD HOLDER:Financial ServicesRETENTION:Current fiscal year, 6 years, Destroy. General Budget documents are retained for 1 year<br/>active retention, 1 year semi-active, and then destroy.

#### 1380 FUNDING

Records related to funding. Includes a variety of funding letters and reporting documentation to and from various agencies and/or government departments. This is dependent upon new or innovative programming. Includes records on special and conditional agreements, base operating grants, performance funding sources and Access fund reporting.

MASTER RECORD HOLDER:Financial ServicesRETENTION:Current fiscal year, 6 years, Destroy

#### 1400 GENERAL ACCOUNTING

Records related to general accounting, including account listings, collections, financial data, financial maintenance system, fixed assets, goods and services tax, interest, perishable inventories and receivables.

MASTER RECORD HOLDER:Financial ServicesRETENTION:Current fiscal year, 6 years, Destroy

#### 1430 INTERNAL CONTROLS

Records of special internal audit or reviews conducted based on adherence or variance checks on submissions, data and reports.

MASTER RECORD HOLDER:Financial ServicesRETENTION:Current fiscal year, 6 years, Destroy

#### 1440 INVESTMENTS

Records related to investments, including records on earnings distribution.

MASTER RECORD HOLDER:Financial ServicesRETENTION:Current fiscal year, 6 years, Destroy

#### 1450 PROCUREMENT MANAGEMENT

Records about the purchasing and requisition process including purchase requisitions, purchase orders, solicitation, shipping and receiving and disposal. Includes records on the purchasing consortium, petty cash, the administration of and accounting procedures for credit cards and management of vendor records.

MASTER RECORD HOLDER:Financial ServicesRETENTION:Fiscal year end, 6 years, Destroy. Records related to construction RFP and RFQ's<br/>retained for 10 years.

#### 1495 STUDENT FINANCIAL AID

To document the provision of financial aid to students as well as emergency student loan records and related documentation.

 MASTER RECORD HOLDER:
 Registrar

 RETENTION:
 Transaction Complete\*, 2 years, Destroy; Alberta Works records are retained until AB

 Human Services policy indicates; then files and lists are sent to the Alberta

 Government.

#### **INFORMATION (1500 - 1699)**

1500 GENERAL - INFORMATION

Records about information not found elsewhere in this block.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Superceded/Obsolete, Destroy

#### 1505 DEPARTMENTAL PROCEDURES - INFORMATION

Internal operational guidelines and practices that provide direction to employees. These records consist of correspondence, procedures manuals and guidelines, but not official College policy.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Superceded/Obsolete, DestroyCROSS REFERENCE:For official College policies see 0510 College-wide Policy and Procedure

#### 1510 REPORTS AND STATISTICS - INFORMATION

Includes reports and statistics relating to information management.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Superceded/Obsolete, 5 years, Destroy

#### 1530 ARCHIVES MANAGEMENT

Includes records related to the management of the archives program.

MASTER RECORD HOLDER:Institutional PlanningRETENTION:Superceded/Obsolete, 3 years, Archival Selection

#### 1552 POSTAL AND COURIER SERVICES

Records about courier services used by the College, including correspondence received by and sent to the various courier services. Also includes records about the College mail system and Canada Post on postal codes, handling of campus mail, postal regulations, postal rates, mail traces, etc.

MASTER RECORD HOLDER:Financial ServicesRETENTION:Current Fiscal Year, 6 years, Destroy

#### 1570 FREEDOM OF INFORMATION AND PROTECTION OF PRIVACY - GENERAL

Records relating to the roles and responsibilities for administering the FOIP legislation; delegating of authority; reporting requirements. Includes information relating to the development, submission and maintenance of Alberta Directory information. Also includes automated or manual tracking and processing systems and testing procedures. Records relating to the development, implementation and amendment of policies, guidelines and procedures; to comply with the provisions of the Freedom of Information and Protection of Privacy Act in regard to right of access to College information by individuals, groups and organizations as specified under the provisions of the Freedom of Information and Protection, use, disclosure and protection of personal information. Also includes security arrangements, including breaches, violations and administrative or disciplinary sanctions; data sharing agreements; data matching programs; privacy and personal information management guidelines. Includes information sharing agreements and background documentation.

MASTER RECORD HOLDER:Institutional PlanningRETENTION:Superceded/Obsolete, 2 years, Destroy

#### 1575 FREEDOM OF INFORMATION AND PROTECTION OF PRIVACY - REQUESTS AND RESPONSES

Records relating to regular and reformulated, repetitious systematic or continuing requests by individuals, groups or organizations for access to general information under the provisions of the Freedom of Information and Protection of Privacy Act. Includes original request, notice of change (of scope of request), collection of fees, acknowledgement of receipt of request, follow-up letters and transmittal memorandums, access request review, requests for extension, third party notification, access request review recommendations and summaries, and request response package, including any severed information. If access is denied, notification of a review or complaint request could be received from the Information and Privacy Commissioner. Includes mediation authorization and settlements, representations from parties and reports, recommendations and Orders issued by the Information and Privacy Commissioner or an Adjudicator, and judicial reviews. Also includes abandoned requests.

MASTER RECORD HOLDER:Institutional PlanningRETENTION:Completion of request or issuance of Commissioner's Findings, 5 year Destroy

#### 1630 RECORDS MANAGEMENT

To document the records function at Lethbridge College. Records include current and previous records classification, retention and disposition schedules and correspondence and information relating to same. Also includes inventories of college records and approved disposition authorities including legal opinions, supporting documentation, departmental approvals, amendments, consolidations or cancellations.

MASTER RECORD HOLDER:Institutional PlanningRETENTION:Superceded/Obsolete, 10 years Destroy, retention schedules and certificates of<br/>destruction retained permanently.

#### PUBLIC AND COMMUNITY RELATIONS (1700 - 1999)

#### 1700 GENERAL - PUBLIC AND COMMUNITY RELATIONS

Includes records relating to Public and Community Relations not included elsewhere in this block.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Superceded/Obsolete, Destroy

#### 1705 DEPARTMENTAL PROCEDURES - PUBLIC AND COMMUNITY RELATIONS

Internal operational guidelines and practices that provide direction to employees. These records consist of correspondence, procedures manuals and guidelines.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Superceded/Obsolete, DestroyCROSS REFERENCE:For official College policies see 0510 College-wide Policy and Procedure

#### 1710 REPORTS AND STATISTICS - PUBLIC AND COMMUNITY RELATIONS

Includes reports and statistics relating to public and community relations.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Superceded/Obsolete, Destroy

#### 1730 ADVERTISING & WEB SERVICES

Includes records relating to advertising and promotion of credit and non-credit programs, as well as general correspondence with ads regarding all marketing campaigns. Includes promotional material, newsletters, brochures/flyers, advertisements and correspondence relating to advertising for program areas. Includes international marketing.

MASTER RECORD HOLDER:AdvancementRETENTION:Superceded/Obsolete, 2 years, Destroy

#### 1740 ALUMNI RELATIONS

Includes records related to Lethbridge College alumni relations.

MASTER RECORD HOLDER:AdvancementRETENTION:Superceded/Obsolete, 2 years, Archival Selection

#### 1750 CAMPAIGNS AND CANVASSING

Campaigns and drives supported by the College. Examples are Adopt-a-Kodiak, Bridge County Raceway, United Way, etc.

MASTER RECORD HOLDER:AdvancementRETENTION:Superceded/Obsolete, 5 years, Archival Selection

#### 1770 COLLEGE VISUAL IDENTITY

Records about College visual identity. Includes LC name and logo, LC style guide, and records on the College flag. Includes records about visual identity for academic programs. Includes logos, artwork and photos of events and participants.

MASTER RECORD HOLDER:AdvancementRETENTION:Superceded/Obsolete, 5 years, Destroy

#### 1790 DEVELOPMENT - GENERAL

Includes records relating to the Development Office not included elsewhere in this series.

MASTER RECORD HOLDER:AdvancementRETENTION:Superceded/Obsolete, 3 years, Destroy

#### 1795 DEVELOPMENT - FUNDRAISING

Includes records relating to fund raising activities such as receipt of monies, property and art objects and specific projects; administration of endowments, scholarships and awards.

MASTER RECORD HOLDER:AdvancementRETENTION:Superceded/Obsolete, 6 years, Destroy

#### 1830 MEDIA RELATIONS

Records about Lethbridge College's relations with media organizations. This includes print, broadcasting and electronic media sources. Includes newspaper clippings and news releases.

MASTER RECORD HOLDER:AdvancementRETENTION:Superceded/Obsolete, 2 years, Archival Selection

#### 1870 PHOTOGRAPHS AND IMAGES

Photographs of buildings, students, programs, classrooms, employees and college activities.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Superceded/Obsolete, 5 years, Archival Selection

#### 1890 PRESENTATIONS

Records about presentations prepared and given by employees, usually related to LC, management or related topics. Includes speeches, lectures, addresses, arrangements for presentations and resulting reports.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Transaction Complete\*, 2 years, Archival Selection

#### 1910 PROMOTIONS AND EVENTS

Includes records on external and internal competitions, special events, divisional activities, etc.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Transaction Complete\*, 2 years, Archival Selection

#### 1940 PROTOCOL

Includes records on rules of protocol procedures and etiquette, in particular with respect to the College's relations and liaison with international countries and institutions.

MASTER RECORD HOLDER:President's OfficeRETENTION:Superceded/Obsolete, 5 years, Destroy

#### 1960 PUBLICATIONS - INTERNAL

Records documenting publications internally generated by Lethbridge College. Includes records relating to the planning, design, compilation, standards and production (drafts and artwork) of official College publications such as articles, books, periodicals, guides, manuscripts, pamphlets, calendars, brochures and newsletters to be distributed internally as well as to the general public.

MASTER RECORD HOLDER:AdvancementRETENTION:Superceded/Obsolete, 5 years Archival Selection

#### 1980 TOURS AND VISITORS

Records about the arrangement and conduct of visits and tours of Lethbridge College. Includes preparations for visits by officials and dignitaries, and tours by Cabinet, Government employees and officials, including briefing materials and itineraries. Includes records on tours for individuals, students, general public and schools.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Transaction Complete\*, 2 years, Destroy

#### SERVICES (2000 - 2599)

2000 GENERAL - SERVICES

Includes records related to Ancillary and Support Services not included elsewhere in this block.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Superceded/Obsolete, Destroy

#### 2005 DEPARTMENTAL PROCEDURES - SERVICES

Internal operational guidelines and practices that provide direction to employees. These records consist of correspondence, procedures manuals and guidelines, but not official College policy.

MASTER RECORD HOLDER:	Various Departments
RETENTION:	Superceded/Obsolete, Destroy
CROSS REFERENCE:	For official College policies see 0510 College-wide Policy and Procedure

#### 2010 REPORTS AND STATISTICS - SERVICES

Includes reports and statistics relating to ancillary and support services. Includes reports generated to facilitate, support, summarize and maintain a historic/ongoing cumulative record of ancillary and support services.

MASTER RECORD HOLDER:Various DepartmentsRETENTION:Superceded/Obsolete, Destroy

#### 2030 BOOKSTORE

Records about Bookstore services including purchase orders, materials acquisitions, freight bills charge documents, text requisitions and web/ecommerce.

MASTER RECORD HOLDER:Financial ServicesRETENTION:Current fiscal year, 6 years, Destroy

#### 2060 DAYCARE

Includes records about the operation and administration of daycare services at the College including registration and financial records.

MASTER RECORD HOLDER:Student ServicesRETENTION:Transaction Complete\*, 7 years, Destroy

#### 2090 FOOD SERVICES

Records about the operation and administration of Lethbridge College food services, which are intended to provide meals and snacks to employees, students, and the general public. This includes the dining room, menus and price lists, vending machines and vendor contacts.

MASTER RECORD HOLDER:Centre for Applied ManagementRETENTION:Transaction Complete\*, 7 years, Destroy

#### 2120 RESIDENCE

Records about the operation and administration of student housing including rental records, incident reports, hotel tax records, resident assistant records and unit condition reports, etc.

MASTER RECORD HOLDER:Student ServicesRETENTION:Transaction Complete\*, 7 years, Destroy

#### 2180 PHYSICAL EDUCATION BUILDING OPERATIONS

Records related to the operation of the Physical Education building including personal training, client information, fitness assessments, memberships and related documentation.

MASTER RECORD HOLDER:Student ServicesRETENTION:Transaction Complete\*, 2 years, Destroy

#### 2260 ATHLETICS

Records relating to athletics including coaching records, eligibility records, national files, student athlete records, Adopt a Kodiak records, athletic banquet and program records and related documentation.

MASTER RECORD HOLDER:Student ServicesRETENTION:Transaction Complete\*, 2 years, Archival Selection

#### 2280 AUDIO VISUAL SUPPORT

Includes records related to audio visual support.

MASTER RECORD HOLDER:Centre for Teaching, Learning & InnovationRETENTION:Superceded/Obsolete, 3 years, Destroy

#### 2340 INFORMATION TECHNOLOGY

Includes records related to the operation and management of Information Technology Services. This includes records related to the use or needs of customer based information technology services such as laptops/desktops, technical questions and services; records related to Enterprise Software Applications that are maintained or sponsored by the Information Technology Services department; and records related to the wired and wireless network infrastructure on campus.

MASTER RECORD HOLDER:Information Technology ServicesRETENTION:Superceded/Obsolete, 3 years, Destroy

#### 2390 HEALTH SERVICES

Records related to the management of the Health Centre including billing documents, physician's medical records and student intake health records.

MASTER RECORD HOLDER:Student ServicesRETENTION:Date of last entry, 10 years, Destroy. In the case of minors: Age of majority, 10 years,<br/>Destroy

#### 2500 SECURITY

Records related to the administration of security functions for Lethbridge College. Includes records on security alarms, lost and found, security incident reports, and related documentation.

MASTER RECORD HOLDER:Human ResourcesRETENTION:Superceded/Obsolete, 10 years, Destroy

#### 2555 CHAPLAINCY SERVICES

Includes records related to Chaplaincy Services at Lethbridge College.

MASTER RECORD HOLDER:Student ServicesRETENTION:Transaction Complete\*, 10 years, Destroy

#### 2557 COUNSELLING

Includes records related to the provision of counselling services. Includes client information form, informed consent for counselling form, clinical assessment information, progress notes, consent to disclose personal information, non-session notes, assessment and referral reports and a contact summary. Also includes records related to the supervision of students during a Master's level internship. Includes the student's resume, references, record of supervision sessions, program information and evaluations.

MASTER RECORD HOLDER:Student ServicesRETENTION:Transaction Complete\*, 10 years, Destroy

#### 2570 TECHNOLOGY INTEGRATION

Includes records related to technology integration.

MASTER RECORD HOLDER:Centre for Teaching, Learning and InnovationRETENTION:Transaction Complete\*, 10 years, Destroy