

**BYLAW 1817**  
**SCHEDULE “A”**  
**DISPOSITION SCHEDULE**

The subject matter is listed alphabetically followed by a suggested retention period. The retention period is identified by a “P” (permanent retention) or expressed by a number of years, for example 5 (five years), or expressed by a number of years followed by other comments such as S/O (number of years after Superseded or Obsolete) or other specific comments.

Unless otherwise noted, all retention periods are for electronic records, and all records are to be kept electronically. Any paper copies are to be digitized as soon is practicable and paper copies are only kept until such time as they are digitized plus 1 year (to ensure they have been appropriately digitized and backed up prior to disposition), unless paper copies are subject to archival in which case they are kept until they are archived. Method of Disposal refers to how the paper records will be disposed of (Destroyed or Archived - Transferred to Claresholm & District Museum or Provincial Archives) either at end of retention period or after digitized. Any records to be archived will not be transferred to another entity until they are over 10 years old.

	Description of Record	Final Disposal	Retention Period (yrs)
<b>CPO/Bylaw</b>	Appeals	Destroy	10
	Bylaw clean-up and Weed Control Records	Destroy	10
	Complaint Investigation Reports	Destroy	10
	Correspondence (Notices/Orders)	Destroy	10
	Court Records	Destroy	10
	Dog License Records/Journals	Destroy	7
	Investigations/Incident Reports	Destroy	10
	Multimedia Records (Photos/Videos/Audio) - af	Destroy	5
	Officer Notebooks	Destroy	10
	Orders	Destroy	10
	Prosecutions	Destroy	10
	Provincial Offenses/Tickets (after closed)	Destroy	5
	<b>Development Services</b>	Annexation - Correspondence	Destroy
Annexation - Final Order		Archive	Permanent
Business License		Archive	5 S/O
Business License Application & Supporting Documents		Destroy	3 S/O
Compliance Letters		Destroy	Permanent
Development Agreements (Paper & Electronic)		Archive	12 S/O
Development Appeals		Destroy	12 S/O
Development Permits and Supporting Documents		Destroy	12 S/O
Environmental Requests/Reports		Archive	Permanent
Municipal Planning Commission Agenda Package		Archive	Permanent
Municipal Planning Commission Correspondence		Destroy	5
Municipal Planning Commission Minutes		Archive	Permanent
Permits - Building, Electrical, Plumbing, Gas		Destroy	12 S/O
Permit/Development Stop Orders and Warnings		Destroy	12 S/O
Plans - Official/Amendments		Archive	Permanent
Site Plan Approval		Archive	12 S/O
Subdivision Appeals		Destroy	12 S/O
Subdivision Plan (after final approval)	Archive	Permanent	

	Description of Record	Final Disposal	Retention Period (yrs)
Fire/Emergency	Emergency & Disaster Exercise Records/Reports	Destroy	7
	Emergency & Disaster Plans	Archive	5 S/O
	Emergency Event Documentation	Archive	Permanent
	Fire/Emergency Statistics and Data	Archive	10
	Fire Investigations	Destroy	10
	Fire Safety Codes Inspections	Destroy	10 S/O
	Member/Staff Training Records	Destroy	5 S/O
	Response Call Records	Destroy	10
Finance	Accounts Payable Vouchers/Records with Cheque Stub	Destroy	7
	Accounts Receivable - Duplicate Invoice, Supporting Documents	Destroy	7
	Audit Working Papers	Destroy	7
	Audited Financial Statements	Archive	Permanent
	Bank Statements / Cancelled Cheques	Destroy	7
	Bank Reconciliations with supporting documents	Destroy	7
	Billing Batch Documentation generated from Accounting Software	Destroy	7
	Budgets	Archive	Permanent
	Budgets - Working Papers	Destroy	7
	Cash Receipting Journal/Duplicate Receipts	Destroy	7
	Credit Card Applications	Destroy	3 S/O
	Deposit Slips / Deposit Book	Destroy	7
	Financial Information Return (FIR)	Destroy	7
	Grant Files (Application, Approval, Final Reporting and Supporting Documents)	Destroy	7
	Grants/Donations from the Municipality (Request/Application, Correspondence, Reporting)	Destroy	7
	Insurance Claims	Destroy	11
	Insurance Policy	Destroy	3 S/O
	Memos - Credit/Debit	Destroy	7
	Pre-Authorized Payment Plans (Tax or Utilities) or EFT Authorization Forms	Destroy	1 S/O
	Requests for Tender/Proposal	Destroy	11
	Requisitions	Destroy	7
	TCA/Land Sale/Disposal Documents	Destroy	7
	Tenders/Proposals - Successful	Destroy	11
	Tenders/Proposals - Unsuccessful	Destroy	3
	Utility Account Forms	Destroy	3 S/O

	Description of Record	Final Disposal	Retention Period (yrs)
General	Advertising, as per legislation	Destroy	7
	Advertising, general	Destroy	2
	Administration Reports (not part of minutes)	Archive	7
	Agendas (Part of Minutes)	Archive	Permanent
	Agreements (Paper & Electronic)	Destroy	12 S/O
	Annual Reports	Archive	7
	Appointments (other than those in minutes)	Destroy	3
	Board/Committee Authority Structure	Destroy	5 S/O
	Board/Committee Correspondence	Destroy	5
	Briefings/Reports to Council	Archive	7
	Bylaws	Archive	Permanent
	Census Reports	Archive	12
	Claims (Notice of/Statements of)	Destroy	12 S/O
	Contracts (Paper & Electronic)	Destroy	12 S/O
	Court Cases	Destroy	12 S/O
	Destroyed Records Index	Archive	Permanent
	Easements	Archive	12 S/O
	E-Bill (Go Paperless) Forms (Paper & Electronic)	Destroy	1 S/O
	Franchises (Paper & Electronic)	Archive	Permanent
	Inquiries (from the public)	Destroy	3
	Land/Property Files	Destroy	12 after sold
	Leases (Paper & Electronic)	Destroy	12 S/O
	Legal Opinions/Proceedings (Paper & Electronic)	Destroy	12 S/O
	Legislation - Acts	Destroy	1 S/O
	Minutes (Council, Committee, Board)	Archive	Permanent
	Organization Structure and Records	Archive	5 S/O
	Petitions (Paper)	Archive	10
	Policy	Destroy	5 S/O
	Publications - Local Reports	Archive	3
	Training and Development Files	Destroy	5
Writs (Paper & Electronic)	Destroy	12	

	Description of Record	Final Disposal	Retention Period (yrs)
Human Resources	Employee Benefits Records/Reports (Health, Dental, Pension, Etc)	Destroy	7
	Employment Applications - Not Hired	Destroy	1
	Investigation Files (after closed)	Destroy	12
	Job Descriptions	Destroy	3 S/O
	Organizational Chart	Destroy	5 S/O
	Personnel File (After cessation of employment)	Destroy	1
	Personnel File (After termination of employment)	Destroy	6
	Record of Employment (after cessation of employment)	Destroy	5
	Seniority Lists	Destroy	1 S/O
	Training Certificates/Professional Development Records (after cessation of employment)	Destroy	2
	WCB Claims	Destroy	7
	<b>Personnel records include items such as Job application (successful), offer letter, raise letters, discipline, performance reviews, benefit enrollment forms, etc. All Personnel Records are "Permanent" until end of employment as per the "Personnel File" retention periods noted above with the following exceptions:</b>		
	Discipline Records (unless member of collective bargaining unit which has separate rules)	Destroy	5
	Doctor's note or certificates of illness not related to long-term disability or WCB claim	Destroy	2
Grievance Correspondence (after resolved)	Destroy	10	
Payroll	Deductions	Destroy	7
	Garnishees (after garnishee is removed)	Destroy	7
	Individual Earnings Records	Destroy	7
	Payroll Journal	Destroy	7
	T4s & T4 Summaries	Destroy	7
	TD1 Forms	Destroy	1 S/O
	Timesheets	Destroy	7

	Description of Record	Final Disposal	Retention Period (yrs)
Operations/Infrastructure	Capital Project Files	Destroy	7
	Cemetery Internments	Archive	Permanent
	Engineering Drawings (Projects, Subdivisions, etc.)	Archive	Permanent
	Inventory Records	Destroy	7
	Infrastructure Records (Maps, As built, Engineering, Final Billing, etc.)	Archive	Permanent
	Land Appraisals	Destroy	3 S/O
	Maintenance Records/Reports	Destroy	12
	Project Progress Reports	Destroy	7
	Utility Management Records/Reports (non-asset) - Water Treatment & Distribution, Wastewater, Storm Water)	Destroy	7
	Vehicle Logs	Destroy	3
	Health and Safety	Accident/Incident Reporting, Investigations and First Aid Reports	Destroy
Complaints (Health and Safety/Harrasment)		Destroy	10
Employee Reporting - Tool box meetings, Hazard assessments, Confined space, etc.		Destroy	7
External Health and Safety Audits		Destroy	10
Health and Safety Committee Meeting Minutes		Archive	Permanent
Health and Safety Manual		Destroy	S/O
Inspections		Destroy	7
Investigations (Health and Safety/Harrasment)		Destroy	10
MSDS Sheets		Destroy	S/O
Taxation	Safe Work Procedures	Destroy	S/O
	Assessment Appeals	Destroy	12
	Assessment Appeal Board File	Destroy	5
	Assessment Rolls	Archive	Permanent
	Assessment Review Board (ARB) Minutes	Archive	Permanent
	Assessment Review Board (ARB) Work Files	Destroy	5
	Assessment Review Court Records	Destroy	7
	Certificates of Title	Archive	Permanent
	Local Improvement Tax Plan/Records	Archive	Permanent
	Mortgage Journal Reports or Correspondence	Destroy	7
	Notice of Change of Land Titles	Destroy	12 S/O
	Tax Certificates and Search Request Letters	Destroy	2
	Tax Journal	Destroy	7
	Tax Notices	Archive	Permanent
	Tax Recovery Records	Destroy	7
	Tax Rolls	Archive	Permanent
	Tax Sale Deeds	Destroy	Permanent
Taxes Arrears	Destroy	7	

