



AP 4.04

Category: Business Administration

Records Retention and Disposition

BACKGROUND & RATIONALE

The retention and disposition of records falls under the *Freedom of Information and Protection of Privacy Act* (FOIP). Part 1 of FOIP deals with access to records held by public bodies and Part 2 deals with rules concerning the protection of the privacy of personal information about individuals that is held by public bodies.

DEFINITIONS

1. **Retention** - the continued possession, use, or control of something.
2. **Disposition** - transferring or relinquishing.
3. **Protocol** - the official procedure or system of rules adopted by a body to address cases or situations.

PROCEDURE

4. Any record in the custody of or under the control of the CAPE charter school, including any record containing personal information, shall be maintained, retained and, where applicable, disposed of in a manner consistent with the *Freedom of Information and Protection of Privacy Act* and the protocols established by the CAPE Charter Board.
5. The Principal shall be responsible for the maintenance of student records retention and disposition.
 - 5.1 The Superintendent will grant access to the Extranet to the appropriate individuals.
 - 5.2 The principal will ensure that all appropriate forms and templates are in place at the start of each school year.
 - 5.3 The Student Data Officer will maintains all electronic files on PASI (a repository of student information, available on-line in real time, shared between individuals and organizations who required access to the information including: students, parents, schools, school authorities and Alberta Education).
 - 5.4 The Student Data Officer maintains all electronic files on Edsembli, the system that manages report cards, etc..

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- 5.5 All information in the student record, hard copy or electronic, is to comply with *Section 56* of the *Education Act*, the *Freedom of Information and Protection of Privacy (FOIP)*, and the *Student Record Regulation*.
- 5.6 All information in the Student Record may be disclosed only in accordance with the *Education Act*, the *Student Record Regulation*, and the *Freedom of Information and Protection of Privacy Act*.
- 5.7 All records not maintained electronically are to be securely stored and retained for a period of seven (7) years. All site-based electronic records are maintained for a period of seven (7) years. All records maintained through PASI and Edsembli are the responsibility of the appropriate agencies.
6. The Secretary-Treasurer is responsible for the maintenance of all financial records retention and disposition.
 - 6.1 All electronic and hard copy financial records including, but not limited to, Audited Financial Statements, budgets, correspondence, receivable and payables, fees, bank statements are to be kept secure through the use of password protected files or in secure locked filing cabinets.
7. The Superintendent shall be responsible for the maintenance of personnel records retention and disposition.
 - 7.1 The Superintendent will ensure that any financial employee records are maintained in accordance with established protocols by the Secretary-Treasurer or delegate.
 - 7.2 All electronic and hard copy financial records including, but not limited to, curriculum vitae, Records of Employment, evaluations, correspondence, and certifications are to be kept secure through the use of password protected files or in secure locked filing cabinets.
 - 7.3 All records are to be retained for the full employment period and for a period of seven (7) years upon termination of employment.
8. The Director of Student Services is responsible for the maintenance of all student services records retention and disposition.
 - 8.1 All electronic and hard copy records including, but not limited to, assessments, reports, conference notes, and planning notes are to be kept secure through the use of password protected files or in secure locked filing cabinets.

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9. The Vice-Principal is responsible for the maintenance of all discipline records retention and disposition:
 - 9.1 All electronic and hard copy disciplinary records including, but not limited to, discipline forms, disposition of incidents, conference notes, and planning notes are to be kept secure through the use of pass-word protected files or in secure locked filing cabinets.
10. All records shall be secured and access granted only to individuals designated by the Superintendent.

References:

Education Act

Guide to Education

Student Record Regulation 225/2006

Freedom of Information and Protection of Privacy Act ("FOIP Act")

Student Evaluation Regulation

Canadian Charter of Rights and Freedoms

CAPE charter

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