Class number – Title of Records Class

[Note: Each records classification & retention schedule follows a standard format, as described in this document]

A brief description of the records within the records class.

Content & Scope
This section includes background information on the University activities and processes in which the records are created and used, and an overview of the types of records in the records class. It may also describe records excluded from the class because they are classified elsewhere.

Media
When required, this section provides information on the approved format and media of the records (e.g., paper or electronic documents, databases).

Related Records
Cross-references to similar or related records classes and to the classification of records explicitly excluded from this records class.

Responsible Unit
The office(s) responsible for keeping the official copy of the records.

Information Steward
As defined in Policy 46 – Information Management, the senior administrator(s) delegated responsibility, on behalf of the University, for providing strategic oversight of the management, use and disposal of the records class. The University’s information stewards are listed in the Directory of Administrative Information Stewards.

Information Confidentiality Classification
The information confidentiality classification of the records, as defined in Policy 46. This section is labelled Privacy Classification in retention schedules prepared before 2019 which have not yet been updated.

Retention
The retention period(s) for official records by the responsible unit(s).

If the retention statement defines a minimum and a maximum retention period (e.g., “minimum of 7 years and no more than 20 years”) then the unit must document the retention period they are using within that range, and follow it consistently.
Disposition
Whether the records should be destroyed at the end of the retention period or preserved as part of the University archives due to their long-term historical value.

If the disposition is Archives or Archives Selection, there may be notes with instructions regarding further actions required to ensure preservation of the records.

Archival Records
Additional information on the records which should be preserved as part of the University archives.

Authority
References to any statutes, regulations, University policies, or other authoritative sources pertaining to the records.

Retention Rationale
Additional information on the records retention period and record-keeping requirements in the above cited authorities.

Other Units with Copies
Copies kept by offices other than the responsible unit(s), for operational use or convenience. Information on the retention of copies of records is included only if special record-keeping rules apply to these copies (e.g., the records contain personal information which must be managed in accordance with the Freedom of Information & Protection of Privacy Act).

Retention of Copies
The retention period for copies. Copies of records must not be retained for longer than the retention period of the official record.

Disposition of Copies
Method of destruction for copies.

Personal Information Banks
A description of any Personal Information Banks (PIBs) in the records class. Consult the Information & Privacy website for further information on PIBs.

Approval Date
Date the retention schedule was approved by the University Secretary and CIO. Current retention schedules are identified by their approval date.

Previous Version
The approval date of the previous, now withdrawn, version of the retention schedule.

If the previous version had a different records class number or title, or if the new retention schedule consolidates a number of withdrawn retention schedules, the class numbers and titles of the withdrawn retention schedules will be listed in this section to facilitate transition to the new retention schedule.