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Version visionnée sur le site Internet d'origine le 16 avril 2009.

Section du dépôt légal

RECORDS RETENTION SCHEDULES FOR QUEBEC ACADEMIC INSTITUTIONS

Based on French language electronic version updated May 30, 2002/
Version française disponible: <http://www.crepuq.qc.ca>

CREPUQ – Archivists Sub-committee

Produced by Archivists Sub-committee,
under the aegis of the CREPUQ Secretaries-General Committee.

In June 2003, the *Conference of Rectors and Principals of Quebec Universities* received an award for this publication from the *Association des archivistes du Québec* :

"The *Association des archivistes du Québec* is proud to grant the 2002-2003 Organization Award to the *Conference of Rectors and Principals of Quebec Universities (CREPUQ)* in recognition of its major contribution to the development of archival sciences in Quebec, elsewhere in Canada and around the world."

[\(See the press release.\)](#)



CREPUQ
CONFÉRENCE DES RECTEURS
ET DES PRINCIPAUX
DES UNIVERSITÉS DU QUÉBEC

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Publication No.: 2004-01
Legal deposit – First quarter 2004
Bibliothèque nationale du Québec
National Library of Canada
ISBN: 2-89574-024-0

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Association des archivistes du Québec Inc.

COMMUNIQUÉ

06-2003

Pour publication immédiate



Prix annuel aux organismes publics 2002-2003



Lors de son 32e congrès annuel qui a eu lieu à Trois-Rivières, du 12 au 14 juin 2003, l'Association des archivistes du Québec a remis le Prix de l'organisme de l'année à la Conférence des recteurs et des principaux des universités du Québec (CREPUQ) pour le recueil des règles de conservation des documents des établissements universitaires québécois.

Publié par le Sous-comité des archivistes de la CREPUQ, ce recueil est publié et diffusé en édition électronique, sur Internet, où il est disponible gratuitement. Le Recueil constitue l'aboutissement d'une réflexion collective menée par les archivistes universitaires de la CREPUQ. Cette récente publication a fait l'objet de félicitations explicites de la part de la Commission des biens culturels du Québec et sert, actuellement de modèle aux Archives nationales du Québec auprès d'organismes publics. À la demande du Conseil international des archives, le Recueil a été présenté à Lima (Pérou), en septembre 2002, au Colloque annuel de sa Section des universités et des institutions de recherche, où il a soulevé l'intérêt de plusieurs archivistes en provenance de divers pays. Ce Recueil fait en plus l'objet de travaux (non encore publics) de traduction (anglaise) qui sera mis à la disposition de tous les archivistes canadiens.

Considérant l'apport déterminant de cette publication au développement de l'archivistique au Québec, au Canada et ailleurs dans le monde, l'Association des archivistes est fière de remettre le prix de l'organisme 2002-2003 à la Conférence des recteurs et des principaux des universités du Québec (CREPUQ).

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Source: Comité des prix annuels

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05	Student Affairs
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AUCC-CREPUQ Introductory Remarks

The *Recueil des règles de conservation des documents des établissements universitaires québécois* and its English language translation, *Records Retention Schedules for Quebec Academic Institutions* reflect a series of collaborations aimed at promoting more efficient management of university-based records and record keeping systems. Quebec university archivists have provided significant leadership in both archives and records management, bringing together their shared expertise as CREPUQ's Sub-Committee of Archivists. The opportunity to share the advances made by Quebec universities was first proposed to English Canadian archivists by Guy Diné (Division des archives, Université Laval) shortly after the publication of the *Recueil*. The positive response to the possibility of additional collaboration from both CREPUQ and AUCC, as well as the interest of the archival profession (Association of Canadian Archivists) and their institutions (Canadian Council of Archives) was further evidence of a growing momentum toward interuniversity co-operation and collaboration particularly on the issue of better managing our growing information assets.

As a guide to the maintenance of university records *The Quebec Schedules* provides critical advice to institutions in a time of increasingly complex and diverse record keeping. As the management of university records attracts attention on the international level through the International Council of Archives Section on University Archives, we trust this translation, and the original French-language *Recueil*, will be recognized for their groundbreaking quality and originality. We are confident that this collaboration and the approval of *The Quebec Schedules* by both the AUCC and CREPUQ represent a significant step for university record keeping.

We would like to recognize the work of the English-language editors, Johanne Pelletier (McGill University Archives) and Garron Wells (University of Toronto Archives) without whom the completion of this project would not have been possible. Our thanks also to Claude Minotto (Université de Montréal), André

Gareau (Université du Québec à Montréal), Robin Keirstead (University of Western Ontario), the CREPUQ Archivists' Sub-Committee, and the Secretary Generals' Committee for their input and support throughout the project. The coordination of this effort was facilitated and supported by our own organizational staff, most significantly, Yvon Albert Laurendeau (CREPUQ), Rosemary Cavan (AUCC), and Roger Charland (CREPUQ's webmaster).

Robert G. Giroux
President-Director General, AUCC
December 2003

Jacques Bordeleau
Director General, CREPUQ



Records Retention Schedules for
Quebec Academic Institutions

Technical Introduction

The English language translation of *Recueil des règles de conservation des documents des établissements universitaires québécois* (2002) is entitled *Records Retention Schedules for Quebec Academic Institutions*, or its shorter form for the purposes of the text, *The Quebec Schedules*. It is important to note that this translation is not an adaptation of the records retention schedules for English Canada, or any specific jurisdiction therein. Our purpose as Editors of the English translation was to ensure that the translation produced by an independent firm was not only technically accurate but a true reflection of the spirit and intent of the original French language version. For this reason all references to Quebec-specific legislation and context affecting academic institutions have remained intact as reference points in the schedules and text.

Analysis of the completed translation did however present a number of questions around the different uses and meanings of records management terminology in the English and French languages. In these instances we came to agreement on the selection of English terminology best suited to the original meaning of the French language term, aiming always for terms both suitable and meaningful to an English speaking audience. Our editorial decisions were based on ensuring readability, accuracy of content, and consistency of language and terminology.

While the title of the original French document refers specifically to universities in the province of Quebec, the English title suggests a broader view (inclusive of all academic institutions) but should not be assumed to be applicable to colleges. The document applies to universities (and other advanced-degree type bodies) but does not apply specifically to colleges. While all (academic/post-secondary) institutions may find relevance in the schedules, the specific needs of colleges in English-Canada have not been taken into account in their preparation. Finally, on the subject of the title, the shortened version, *The Quebec Schedules*, was a

compromise offering some economy throughout the textual parts of the translation, and more importantly, carrying what we consider to be the significant symbol of its origins within Canada. Only minor additions were necessary in the navigation and introduction sections in the form of "Editor's Notes". These comments were included where English-language readers unfamiliar with Quebec records-related publications and legislation would benefit from more information. These notes were also used where issues of terminology and the application of retention recommendations were unclear or the subject of discussion amongst the reviewers.

Note that where there was no official English-language translation available for publication titles or names of official bodies, we noted only the French-language version. However the Editors' Notes offer explanation in plain English on the nature and subject of the cited publications as they appear in the main body of the Introduction. Unofficial translations of the names of official government bodies are noted below along with those instances in which a decision around records management terminology was applied throughout the document:

- **"Règles"** (referring to individual records retention schedules or rules) – translated as **"schedules"**
- **"Recueil"** where used as the shortened form of the French title – translated as ***The Quebec Schedules***
- **"Informatique"** in the media form legend within each schedule – translated as **"electronic"** (rather than "computer" or "computer-generated")
- **"Fichier informatique"** referring to specific rules for electronic records – translated as **"electronic records"** (rather than "computer files" or "electronic files")
- **"Élimination"** - translated as **"destruction"**
- **"Conservation"** – translated as **"retention"**
- **"Calendrier de conservation"** - translate as **"records retention schedule"**
- **"Resources documentaires et muséologiques"** in Chapter 9, was translated as **"Archives, Library and Museum Holdings"** (rather than Documentary and museological holdings)
- **"Commission d'accès à l'information du Québec"** (Quebec's access commission)
- **"Commission des biens culturels du Québec"** (Quebec's commission on cultural property issues)
- **"Archives nationales du Québec"** (Quebec's national archives)
- **"Calendrier-type de conservation des**

- **documents”** (model retention schedules)
- **“Établissement du calendrier de conservation des documents informatiques d'un organisme public”** (establishment of a retention schedule for electronic records held by public organizations)

The index is an edited translation of the original French-language index, including as in the original, title, key word, and subject entries. The only changes occur where our choice of terms (as in the above listing) was different from the literal translation provided by the translation firm. The *Introduction* for both languages clearly states that the *Recueil* or *Schedules* represent a general model and are not intended to be prescriptive for all institutions concerned. Indeed the purpose of the project was to provide a common guide or baseline approach, on which institutions can build, adapt and further elaborate schedules (and index) according to their institutional context.

This project would not have been possible without the collaboration and contribution of a range of institutions and individuals. We would first like to extend our thanks to the Conférence des recteurs et des principaux des universités du Québec (CREPUQ) and the Association of Universities and Colleges of Canada (AUCC) for their initiative and support of this collaborative project. The CREPUQ and AUCC representatives to this project, Yvon-Albert Laurendeau (CREPUQ), Claude Minotto (Chair, Archivists Sub-Committee of CREPUQ), and Rosemary Cavan (AUCC) in particular provided invaluable assistance, guidance and encouragement.

Our thanks also go to the Association of Canadian Archivists and the Canadian Council of Archives (in particular Bryan Corbett and Cheryl Avery respectively) for their support, and to Roger Charland (CREPUQ's Web Master) for his work on the on-line version.

Two colleagues from the university archives community were invited to participate as our external English and French language readers. André Gareau, the Project Archivist on the compilation of the original French language *Recueil* (and currently Archivist with the Service des archives et de gestion des documents, Université du Québec à Montréal) and Robin Keirstead (University Archivist for the University of Western Ontario) provided important and much appreciated comments, insights, and keen editorial skills. Their contributions have been key in ensuring the final version is both accurate and readable. Finally we are indebted to our sponsoring institutions, McGill University and the University of

Toronto for allowing time for this important project.

Johanne Pelletier
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August 2003

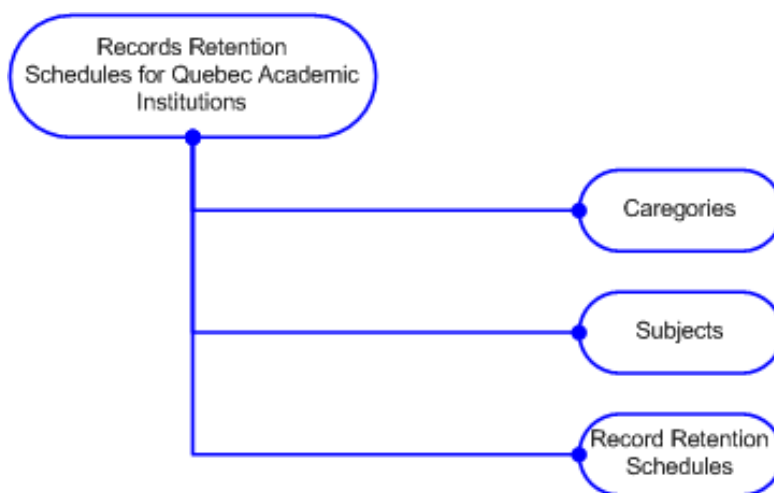


Records Retention Schedules for
Quebec Academic Institutions

Navigation

The electronic version of the current *Records Retention Schedules for Quebec Academic Institutions* is accessible to the public at <http://www.crepuq.qc.ca>. This web-based format is the preferred medium for distribution in the hope that its greater availability will benefit the broader community of professional archivists, records managers and students interested in this area.

The Quebec Schedules is organized hierarchically into categories, subjects and schedules, as shown below:



Navigation Options

Hierarchical Navigation: The navigation menu at the top of each page shows links to the components of this structure (the categories, subjects, and the individual schedules themselves). Selecting the categories link will open a window displaying the list of categories of schedules (as below):

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- 03 [Financial Resources](#)
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- 06 [Community Services](#)

07 Teaching

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Each of these nine categories leads to schedules grouped sequentially by [category](#), [subject](#) and [schedule](#). Further selection of a category link will lead to the listing of schedules associated with the category according to subject. To access and print an individual schedule, select the individual number associated with the schedule of interest.

List of Schedules: Selecting [List of Schedules](#) in the navigation menu will bring up the complete list of schedule numbers and titles, and allow navigation according to category, subject and schedule. The following illustrates an example of part of the list:

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02.01	Position management – Electronic records
02.02	Staff and position management
02.03	Staff functions
02.04	Staff recruiting – Electronic records
02.05	Staff recruitment
02.06	Staff hiring

Index Access: Selecting the Index in the navigation menu will bring up a list of the letters of the alphabet, with each letter leading to a list of list of keywords and expressions, and the corresponding schedule numbers. Selecting a single schedule number will lead to the corresponding schedule. The following example is an extract from the index listing references to schedules that include the keyword "media":

09.06	Media
09.07	Media
07.32	Teaching media

The following example shows the various parts of the table for an individual schedule:

[1] 07 - TEACHING / TEACHING ORGANIZATION	
[2] 07.04	[3] Programs: General evaluation and changes

[4] Records dealing with the evaluation of and changes to the institution's educational programs: periodic evaluation plan, evaluation files (consultations program directors, professors and students, evaluation indicators), files of program modifications (minor revisions, major changes) etc.				
[5] copy	[6] unit	Active	[7] semi-active	inactive
primary [a]	Responsible unit	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D
[8] Notes: (D = Destruction R = Retention) ¹ Retention for 2 years after program evaluation or modification. ² Archives selection: Retention of recapitulative reports documenting general program evaluations and changes. Destruction of support records.				
[9] [] = Medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
[10] PREVIOUS SCHEDULE NEXT SCHEDULE				
[11] Updated: 14/3/02				

Note: Parts numbered from 1 to 11 in the above table are explained in the Legend on the next page.

Legend	
[1]	Category / Subject
[2]	Schedule number
[3]	Schedule title
[4]	Description of records covered by the schedule
[5]	Distinction between primary copy and secondary copies of records included
[6]	Originating unit or holder of the primary copy and of secondary copies
[7]	Retention period or disposition prescribed for active, semi-active and inactive stages
[8]	Notes on schedule application
[9]	Record medium, indicated by letters a, b, c, d and e
[10]	Navigation between schedules in the List of Schedules section
[11]	Date of most recent update of schedule by CREPUQ

More detailed methodological information can be found in the [Introduction](#) to *The Quebec Schedules*.

Happy navigating!

Roger Charland, Librarian
Head, Documentation Centre
Webmaster, CREPUQ

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Records Retention Schedules for
Quebec Academic Institutions

Foreword

Records Retention Schedules for Quebec Academic Institutions (The Quebec Schedules) was produced by the CREPUQ Archivists Sub-committee under the authority of CREPUQ's Secretaries-General Committee. The project took two years to complete and represents an original, state-of-the-art contribution to this field. The painstaking attention given to the various stages of a record's life cycle, the structures of university and public archives, and to the preservation of digital records attests to the vision and effectiveness of Quebec's university archivists.

The Quebec Schedules serves as a guide and model for the maintenance of records retention schedules in Quebec universities. It offers a means of better controlling and efficiently managing records produced and maintained by academic institutions. Our hope is that it will prove equally useful to other organizations, especially other teaching bodies, in its on-line format via the CREPUQ Web site. The Archives nationales du Québec, in approving *The Quebec Schedules*, recognized its quality and originality, especially in integrating computerized files with other types of records.

Thanks and congratulations are due to the university archivists for this outstanding contribution to the management of our archival heritage. It is an eloquent example of interuniversity co-operation for the greater good of all academic institutions and indeed for society as a whole.

Jacques Bordeleau
Director-General,

Acknowledgements

Records Retention Schedules for Quebec Academic Institutions (The Quebec Schedules) is the product of the collaboration and contributions of a number of people working within the framework of CREPUQ. First, thanks must go to CREPUQ's Secretaries-General Committee for its unflagging support and confidence, from the project's inception to its completion. Great appreciation is also due to the Archivists Sub-committee, for its meticulous supervision of each stage of the work.

For their expertise and participation in its meetings, I want to thank the members of the Working Group on *Records Retention Schedules for Quebec Academic Institutions*, composed of Guy Diné, Université Laval; Christiane Huot, Université du Québec à Montréal; Pierre Lavigne, École Polytechnique; and myself (the undersigned), of the Université de Montréal. I especially want to acknowledge the Université du Québec à Montréal and André Gareau, their archivist, who so competently managed the project over eighteen months, and met every deadline. I must also make special mention of the École Polytechnique and Pierre Lavigne, who developed a database that could accommodate all the schedules.

Thanks are due as well to CREPUQ's Legal Counsel Sub-committee, and particularly Lucie Dick of the Université de Montréal, and Normand Petitclerc of the Université du Québec à Montréal, for their thorough review of the legal implications of the schedules and for their wise advice.

Equally invaluable were the support work done by CREPUQ's research staff, Danielle Laforest and Yvon Albert Laurendeau, who also served successively as secretary to the Archivists Sub-committee, and the text preparation done by CREPUQ's Webmaster, Roger Charland.

Lastly, I want to thank the Archives nationales du Québec and the Commission des biens culturels du Québec for the care they took in examining and analysing *The Quebec Schedules*, approved by the Archives nationales du Québec in March 2002.

Claude Minotto
Director, Division des archives
Université de Montréal

Co-ordinator, *Records Retention Schedules for Quebec Academic*



Records Retention Schedules for Quebec Academic Institutions

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1. OVERVIEW

This third edition of *Records Retention Schedules for Quebec Academic Institutions (The Quebec Schedules)* published by the Conference of Rectors and Principals of Quebec Universities (CREPUQ), provides a complete revision of retention schedules for paper records, as well as updated schedules for electronic records previously published in *La gestion des archives informatiques*. [Editors' Note: *La gestion des archives informatiques* is a study of electronic records issues and proposed solutions was produced by the CREPUQ Archivists Sub-Committee, and published by the Presses de l'Université du Québec in 1994].

Well before the implementation of the *Archives Act*^[i], Quebec universities have played a crucial role in the development and application of retention schedules, including the early integration of these instruments into the management of archives. By 1985, CREPUQ had produced the first edition of the *Calendrier-type de conservation des documents* on behalf Quebec universities. [Editors' Note: *Le calendrier type* was the first edition of collected "model" or typical retention schedules for Quebec academic institutions, published by CREPUQ in 1985; note that all subsequent references to the *Archives Act* refer to Quebec's *Archives Act* R.S.Q., A-21.1.]

Since the *Archives Act* Quebec archivists in other sectors have developed retention schedules based on the *Calendrier-type* and examples established by

Quebec university archives. These sectors have included health and social service institutions, municipal courts, police services, school boards and CEGEPS, each working together to develop retention schedules as well as criteria for the selection of records for permanent retention.

This edition of *The Quebec Schedules* also incorporates developments in archival science emerging since earlier editions and integrates comments from the Archives nationales du Québec. It is hoped that this edition will encourage Quebec academic institutions to develop new or revise existing schedules and greatly facilitate communication on retention schedule approval with the Archives nationales du Québec.

It should be noted that the current edition, like its predecessors, sets out minimum retention periods that may be accepted as written or adjusted to suit institutional practices. While the retention periods for active and semi-active records may be modified to suit institutional needs, the disposition of inactive records as presented in each of the schedules (destruction, further selection at archives, or retention) is strongly recommended. This recommendation serves the interests of establishing uniformity in documentation available throughout various archival holdings of Quebec's universities.

1.1 Working Group mandate and membership

In order to meet the records management needs of Quebec universities and reflect articles 7 and 8 of the *Archives Act*, CREPUQ's Secretaries-General Committee directed its Archivists Sub-committee to develop a new edition of records schedules incorporating developments in both Quebec law and archival practice. On February 3, 2000, the CREPUQ Archivists Sub-committee set up a Working Group to carry out this task. The group was composed of:

- Guy Diné, Head, Division des archives, Université Laval
- Christiane Huot, Director, Service des archives et de gestion des documents, Université du Québec à Montréal (UQAM)
- Pierre Lavigne, Director, Service des archives, École Polytechnique de Montréal; and
- Claude Minotto, Director, Division des archives, Université de Montréal, and Chair of the Working Group.

CREPUQ delegated responsibility for the project to the Archives and Records Management Service of the Université du Québec à Montréal and to André Gareau, Archivist at UQAM. They were to revise and complete the retention schedules in the second edition of CREPUQ's *Calendrier-type de conservation des documents* (1986) and in *La gestion des archives informatiques* (1994).

1.2 Theoretical framework

1.2.1 Records retention schedules

A brief look at the theoretical framework will provide a clearer understanding of retention scheduling, both as an effective tool for universities to comply with the *Archives Act* and as a key element of records management programming. Articles 7 and 8 of the *Archives Act* require every public institution to establish and keep current a retention schedule for its records:

Art. 7 – "Every public body shall establish and keep up to date a retention schedule determining the periods of use and medium of retention of its active and semi-active records and indicating which inactive records are to be preserved permanently, and which are to be disposed of."

Art. 8 – “[...] Every public body referred to in paragraphs 4 to 7 of the schedule [to this Act] shall, in accordance with the regulations, submit to the Minister, for approval, its retention schedule and any modification respecting the addition of new records or records scheduled for permanent preservation.”

The *Archives Act* defines the term “archives” as “the body of records 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”.

Retention schedules are thus the principal elements in any records management program and constitute an institution’s official policy on the preservation and disposal of its records. They serve as a working tool describing standards for length of retention, and processing of records, from their creation to their destruction or transfer to the archives.

By the term “record” we mean any information conveyed on a medium and
[iii]
intelligible in the form of words, sounds or images .

The formulation of a records retention schedule must then meet several objectives:

- identification and protection of records that are essential or of historical importance;
- reduction in the volume of records;
- reduction in the cost of records retention; and
- enhanced administrative effectiveness.

1.2.2 The Quebec Schedules

The primary purpose of a collection of retention schedules is to provide a common basis for institutions in a given sector to develop their own retention schedules.

The demands of the *Archives Act* and regulations emerging from it such as the *Retention schedules, transfer, deposit and disposal of public archives (Regulation respecting the Archives Act R.S.Q. A-21.1,r.1)*, have underlined the need for published examples of retention schedules that will assist academic institutions in developing their own retention schedules.

1.2.3 Life cycle of the record

[Editors’ Note: The definitions of active, semi-active, and inactive reflect those used in North American records management literature such as the *Glossary of Records and Information Management Terms, 2nd Edition (2000)* published by ARMA International. For those institutions that regard the semi-active and inactive as similar phases, the use of “inactive” here refers to a point at which final disposition of the records is assigned or determined.

Readers should be aware that the retention recommendations may suggest workflows that are not applicable or reflective of all contexts - institutions are encouraged to adapt the schedules to existing circumstances and or workflows.]

The evolution of a record’s value is reflected in the stages of its life cycle:

active, semi-active and inactive.

Active phase

In the first phase of the life cycle, a record is used regularly by its creators. Such records are called ACTIVE. In this phase, the records are kept in the unit that created them, and are filed or organized according to a classification system for ease of access.

Semi-active phase

In the second phase of the life cycle, a record is used occasionally by its creators. Such records are called SEMI-ACTIVE. In the interests of freeing space and equipment, such records having ended their active phase are transferred to the semi-active records centre of an archives. The unit transferring such records retains all rights in these records, and may borrow them or return them to regular use as is required.

Inactive phase

In the third phase a record is no longer used for administrative, legal or financial purposes. Such records are called INACTIVE. At this point records may be eliminated unless they have historical value (approximately 5% of the total records volume may have some historical value). Records that have historical value are transferred to the archives, and the transferring unit relinquishes jurisdiction over the records to the management of the archives.

1.2.4 Primary and secondary copies

Each of the schedules determines the length of time records will be retained by dividing them into two categories: primary and secondary copies.

The primary copy is the record that contains the most complete information on a given subject.

The secondary copy, if any, derives from the primary copy and is used as a working tool for information or dissemination. They are usually portions or reproductions of the primary copy, and are kept for a much shorter time.

1.3 Development of *The Quebec Schedules*

1.3.1 Participants and responsibilities

The Quebec Schedules is based on an analytical inventory of the retention schedules already in existence in Quebec universities and as such differs from the retention schedules developed in individual institutions.

The preparation of this document required several phases and the participation of numerous colleagues.

Development of *The Quebec Schedules* began with the project archivist's analysis of records retention schedules used in various Quebec academic institutions. This was followed by a compilation identifying similar retention schedules that could be grouped together. On the basis of this compilation proposed schedules reflecting the individual schedules reviewed were drafted. The consultation process on the proposed schedules included review by the members of the Working Group as well as the members of the CREPUQ Archivists Sub-committee, representatives of the CREPUQ Legal Counsel Sub-committee, and finally submission to the representatives of the Archives nationales du Québec. All the comments obtained through this process were analysed by the Working Group, who then made a number of adjustments, amending, creating, grouping or withdrawing certain schedules. The final version of *The Quebec Schedules* was approved by the Archivists Sub-committee, by CREPUQ's Secretaries-General Committee and (following a favourable recommendation by the Commission des

biens culturels du Québec) the Archives nationales du Québec. [Editors' Note : The Commission des biens culturels du Québec is responsible for cultural property matters under Quebec's Cultural Property Act R.S.Q. B-4].

1.3.2 Methodological considerations

While *The Quebec Schedules* is intended to meet the needs of Quebec's academic institutions, it does not cover every single administrative situation, and does not include schedules too specific to any one institution or record-keeping situation. This is especially the case for certain features of terminology and the division of responsibility among different units. Records pertaining to construction, for example, might not be dealt with in the same manner by every institution, and would therefore be subject to different retention schedules.

This third edition of *The Quebec Schedules* (revised in the Fall of 2001) comprises a total of three hundred retention schedules, serving as a guide to each individual academic institution in developing and updating its own retention schedules. Since an organization's retention schedules must accurately reflect that organization's structures and activities, it is, by definition, UNIQUE; *The Quebec Schedules* will thus have to be adapted to the specific needs of each institution and each institution will have the responsibility to inventory their own records, consult their own managers and decide which of the schedules to adopt and or modify.

- Each institution will have to:
- refine the terminology (the wording of record titles);
- adapt the record descriptions to institutional practices;
- stipulate the use of the records covered;
- identify the responsible units; and
- establish selection criteria where additional selection/appraisal is required upon transferring to archives.

The schedules proposed here are general. They represent the result of an exercise in synthesizing, designed to group different records dealing with a similar subject, for which common retention periods can be established. Institutions are encouraged to formulate their own schedules by grouping them by retention schedule and characteristic features in order to facilitate their application (passage from active to semi-active to inactive, etc.).

Caution will have to be exercised in applying certain schedules developed on the basis of particular record types (preparatory records, working records, subject-matter file, ad hoc file, liaison records, list, inventory, etc.). These schedules do not preclude the formulation of specific schedules by an institution for records whose management and retention necessitate such specificity (e.g. active and semi-active periods, transfer to archives). For this reason, the following caveat applies to each of the schedules: *This schedule applies only to files or records whose subject is not covered by a specific retention schedule.*

Moreover, it is important to note that the provisions of certain schedules developed on the basis of record types have not been systematically carried over into each of the individual schedules concerned. For example, the need to retain policies, procedures and statistics, already covered in the general schedules, has not been repeated in each of the individual schedules on a given subject, although it remains applicable.

The Quebec Schedules define minimum requirements. Each institution is free to take the necessary steps to adopt different retention schedules and present them to the Archives nationales du Québec, where for example it seeks to:

- retain a record in its archives, even though *The Quebec Schedules* suggest

it be destroyed;

- adopt active and semi-active retention periods longer than those proposed in *The Quebec Schedules*;
- adopt retention periods shorter than those proposed in *The Quebec Schedules* where the consequences of retention (retention costs) are considered to outweigh the risk involved in destruction of them; or
- preserve records in a medium different from that proposed in *The Quebec Schedules*.

Schedules involving retention until the 100th anniversary of an individual's birth may be applied differently according to the systems and resources of each institution (for example, an institution that does not have a system based on date of birth may establish a retention limit of eighty years from the date of transfer to the archives).

To facilitate application of *The Quebec Schedules* the current fiscal year is already understood to be included in the proposed retention limit for records with financial implications [Editors' note: this means the retention limit is the number of years recommended AND the fiscal year in which the records were created]. It is also important to ensure that schedules with financial implications comply with generally accepted accounting principles, especially those that have tax implications for the institution as well as for third parties.

In addition, each institution is responsible for the definitive submission of its retention schedules to the Archives nationales du Québec. Each institution must fill out the form for electronic records issued by the Archives nationales du Québec, entitled *Établissement du calendrier de conservation des records informatiques d'un organisme public*. The form enables institutions to spell out information that cannot be included in general schedules such as those in *The Quebec Schedules* (for example, lists of printouts, names of those responsible for the computer system, lists of data bases, etc.). [Editors' Note: The name of the form, unofficially translated is the establishment of records retention scheduling for electronic records held by public organizations. These requirements apply only to Quebec.]

Moreover, the onus is on academic institutions to remain abreast of the latest research and developments in the area of electronic records preservation, such as the InterPARES (International Research on Permanent Authentic Records in Electronic Systems) project.

1.3.3 Legal issues

As mentioned above each of these retention schedules has been reviewed by CREPUQ's Sub-committee of Legal Counsels. Institutions are however still required to review their requirements with their own legal advisors. And, though the advice of legal counsel taken in 2000-01 has been integrated into the formulation of the basic schedules presented here, constant developments in law, practice and technology warrant each institution's seeking a new legal opinion.

The Quebec Schedules were formulated in light of a number of legal implications, including:

- schedules are applied in relation to the nature of the record described rather than the area of activity of the institution for which it was created or by which it was used;
- retention periods, while taking into consideration legal requirements as stipulated in the applicable legislation, are ultimately the result of an overall appraisal of the legal issues for each type of record;

- when two retention schedules apply to the same record, the longer retention period applies;
- the original of every record relating to a lawsuit or claim must be preserved for the length of time set out in schedules 01.48, 01.50 and 01.51, upon notice by the person responsible for the aforesaid lawsuit or claim to the holder of the aforesaid original;
- schedules that suggest retention of records on microfilm or in a digital format must take into account the requirements of the Civil Code of Quebec, the Archives nationales du Québec's *Guide d'imagerie numérique - Numérisation de l'information consignée sur des supports traditionnels* and the *Act to establish a legal framework for information technology* L.Q. 2001 c.32.

[Editors' Note: The *Guide* noted above concerns digital imaging, and was produced by the Archives nationales du Québec. Also note that references to "personal information files management", as in Schedule 1.57, should not be confused with the term "Personal Information Banks" or PIBs used in other jurisdictions. In the Quebec context, this Schedule refers to the organization's method or sequence of actions required to comply with the privacy and access regulations and not the disposition of the data banks themselves.]

2. CONTENTS AND USE

2.1 Retention schedules structure

The Quebec Schedules comprises three hundred retention schedules, grouped by category based on the principal activities of academic institutions. Within each category, schedules are grouped by subject.

2.1.1 List of categories and subjects

[Editors' Note: Regarding the terminology used as category names and as subjects, the terms "administration" and "administrative" are intended in their broadest descriptive sense, referring to management of activities and functions as distinct from academic activities. The use of this term does not presuppose the existence of "operational" categories, as often used in records or file classification plans]

The title "Research and development" is intended to refer to work in the scientific, artistic, and humanities and should not be interpreted as solely related to scientific and/or commercial endeavours. While the term "creation" in the original French title "recherche et création" includes notions of creator and/or authorship associated with artistic and non-scientific works, no suitable term with the same broad resonance as "research and development" was identified. Note also that the use of the term "development" does not include fundraising or "advancement" activities – these functions are described under schedules dealing with fundraising in 02 Financial Resources.]

01. ADMINISTRATION

- Administration - General
- Committees
- Historical, constitutive and regulatory records
- Planning, organization and internal governance
- Reports and statistics
- Administrative records management
- Legal affairs

02. HUMAN RESOURCES

- Staffing
- Personnel files
- Working conditions and benefits
- Occupational health and safety
- Employee evaluation, development and movement
- Labour relations

03. FINANCIAL RESOURCES

- Funding
- Budgets
- Accounting
- Salary management
- Banking, loans, investments and guarantees
- Financial statements
- Taxes

04. REAL AND MOVABLE PROPERTY

- Real property
- Movable property
- Maintenance and repair of real and movable property
- Security

05. STUDENT AFFAIRS

- Student population
- Admissions, registrations, evaluations
- Student services
- Student activities and organizations
- Graduates

06. COMMUNITY SERVICES

- Community services
- Housing services
- Health services
- Legal advice services
- Athletics
- Food services
- Social and cultural services
- Conferences, symposiums, charitable activities

07. TEACHING

- Teaching organization
- Teaching management
- Student evaluation
- Co-operation - teaching

08. RESEARCH AND DEVELOPMENT

- Research and development organization and management
- Research and development funding
- In-house research

Researchers
Cooperation – research and development

09. INFORMATION AND COMMUNICATIONS

Communications
Information
Telecommunications
Archives, library, and museum holdings
Audio-visual and computer

2.1.2 Retention schedule numbering

Each of the schedules in *The Quebec Schedules* is identified by a number composed of the category number of the records concerned, followed by a sequential number.

Within each category, schedules have been grouped by subject according to a sequential numbering but without any logical order.

Example: Schedule 01.27: Activity reports

Category 01: Administration

Subject: Reports and statistics

Number 27: 27th schedule in category 01

To locate the desired schedule, the user can consult the index or the numerical list of schedules; this is especially useful to get a general sense of the different schedules developed for a particular subject.

2.2 Description of information elements

Each schedule contains the following elements:

2.2.1 Retention schedule number_

Two numbers: first the number representing the category concerned and a sequential number for the schedule within each category.

2.2.2 Identification of record or record series

Record title, brief description and use.

2.2.3 Copy type and medium

Description of type of copy (main or secondary) and record medium.

Medium legend:

- A: paper
- B: microfilm
- C: electronic
- D: audio-visual
- E: other

2.2.4 Unit

Name of the unit concerned: "unit responsible" for the primary copy, "other units concerned" for secondary copies.

2.2.5 Retention period and notes

Retention periods establish the duration and management of a record through its various phases: active, semi-active and inactive.

Retention periods of active and semi-active records are generally expressed in numbers of years.

The note, used in previous editions, "As long as the record is in active use", has not been used in this project. We have opted instead for establishing a fixed time period, or have added a number of indications that should enable the active administrative life of any document to be more precisely determined.

The inactive period specifies whether the record should be destroyed or retained and the nature of further selection of records to be done at the archives. The recommendation to apply further selection at archives is always accompanied by additional information to facilitate the identification, evaluation and selection of records with historical value.

Notes may be added where the retention period cannot be expressed in terms of a number of years or where specifics are required to explain the application of time limits, retention, destruction or archival selection.

Retention period and note symbols:

- X: see note
- D: destruction
- R: retention

[Editors' Note - Regarding specific recommendations on retention:

- where schedules refer to retention of electronic systems 10 years or as long as the system exists, the presumption is that the retention will be which ever comes first. It is assumed that additional technical and workflow requirements may be articulated if ongoing maintenance of the system is required.
- where schedules offer a similar option, such as "Retention: 5 years or the duration of warranty, whichever is longer", the purpose is to ensure a minimum retention period covering the period of warranty.
- where a schedule refers to a specific number of years in the semi-active column (as in Schedule 2.24) the intent is to recommend a specific minimum for retention of the records.
- schedules which refer records to the archives for destruction assume that the institutional archives also offers records management services (indeed the presumption of these schedules is a close collaboration if not single service point for both archives and records management services).
- where a schedule refers to 2 years in the active phase, this may be interpreted to mean 2 years including the fiscal year in which the records are created. However, as the introduction states, particular caution must be used in the application of retention for financial records in particular.

- where schedules refer to audio-visual and photographic records, note that this may be generalized to other sound and moving image records (again these schedules are general in nature).]

2.3 Using *The Quebec Schedules*

2.3.1 Index

The index contains the significant terms used in the retention schedules as well as a number of synonyms. The corresponding schedule number is given with each term.

2.3.2 Using the printed version of *The Quebec Schedules*

The printed version begins with a detailed introduction that provides an overview of *The Quebec Schedules* (the mandate, theoretical framework, development process) as well as information about its contents and use (structure and presentation of retention schedules, description of the information contained in each schedule and procedures for use).

There is also a numerical list of all the schedules grouped by category, a detailed table of the three hundred schedules, and an index.

2.3.3 Using the on-line version of *The Quebec Schedules*

A version of *The Quebec Schedules* is available on CREPUQ's Web site (<http://www.crepug.qc.ca>). In addition to presenting all the information available in the printed edition, the site is set up to allow the user to print out schedules individually or by category.

List Of principal SOURCES consulted:

Archives nationales du Québec with the Association de greffiers des cours municipales du Québec (1995). *Recueil des délais de conservation à l'intention des cours municipales du Québec*.

Fédération des commissions scolaires du Québec with the Archives nationales du Québec (1996). *Recueil des délais minimaux suggérés pour la conservation des documents des commissions scolaires*. Revised 1993 and amended 1996, to comply with the Civil Code of Quebec.

GOVERNMENT OF Quebec (2001). *Act to establish a legal framework for information technology*, L.Q. 2001, c. 32

GOVERNMENT OF Quebec (1983). *Archives Act*, R.S.Q., c. A-21.1.

GOVERNMENT OF Quebec (1985). *Regulation respecting retention schedules, transfer, deposit and disposal of public archives*. R.S.Q., c. A-21.1, r.1.

A. Lapierre Gestion documentaire Enr. (2000). *Guide de gestion des documents municipaux*. Developed for the members of the Association des directeurs municipaux du Québec (ADMQ) and the Fédération québécoise des municipalités locales et régionales (FQM).

Solutions Documentaires GESTAR (1999). *Recueil de règles de conservation des documents des établissements de santé et de services sociaux*. Developed for the members of the Association des hôpitaux du Québec, the Association des CLSC et des CHSLD du Québec, the Association des centres jeunesse du Québec, the Fédération de la réadaptation en déficience physique du Québec and the Fédération québécoise des centres de réadaptation pour personnes alcooliques et autres toxicomanies.

Retention schedules of the following universities:

École de technologie supérieure
École des Hautes Études Commerciales de Montréal
École nationale d'administration publique
École Polytechnique de Montréal
Institut national de la recherche scientifique - Institut Armand-Frappier
Télé-Université
Bishop's University
Concordia University
Université de Montréal
Université de Sherbrooke
University of Ottawa
Université du Québec
Université du Québec à Chicoutimi
Université du Québec à Hull
Université du Québec à Montréal
Université du Québec à Rimouski
Université du Québec à Trois-Rivières
Université du Québec en Abitibi-Témiscamingue
Université Laval
McGill University

[i]

Archives Act (Loi sur les archives), L.R.Q., c. A-21.1.

[ii]

This definition draws on language recently used in An Act to Establish a Legal Framework for Information Technology L.Q. 2001, c.32, which stipulates in article 3, "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 used any type of writing, including a system of symbols that may be transcribed into words, sounds or images or another system of symbols. (...)" An Act to Establish a Legal Framework for Information Technology (L.Q. 2001, c.32).

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01 – ADMINISTRATION

01 - ADMINISTRATION / ADMINISTRATION – GENERAL				
01.01	Final versions – Electronic records			
Records whose final version is not subject to revision or periodic updates: reports, studies, minutes of meetings, correspondence, etc. (this schedule applies only to files whose subject is not covered by a specific retention schedule).				
Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹		D ²
secondary [c]	other units concerned	X ³		D
Notes : (D=Destruction R = Retention)				
¹ Retention: 1 year after creation of record or until file is reused for preparing similar records.				
² Destruction: Research value ensured by retention (with archives) of original records on paper or microfilm (if there is no paper or microfilm version, electronic records should be transferred to paper or microform).				
³ Retention: 1 month after receipt of record.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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01 – ADMINISTRATION / ADMINISTRATION - GENERAL				
01.02		Updated records – Electronic records		
Records requiring foreseeable, periodic revision: procedures, policies, regulations, directives, liaison records, inventories, electronic spreadsheets, etc. (this schedule applies only to files whose contents are not covered by a specific retention schedule).				
Copy	Unit	Active	Semi-active	Inactive

primary [c]	unit responsible	X ¹		D ²
secondary [c]	other units concerned	X ³		D
Notes : (D = Destruction R = Retention) ¹ Retention: Until next updating of records or until a final version is produced. ² Destruction: Research value ensured by retention (with archives) of original records on paper or microfilm (if there is no paper or microfilm version, electronic records should be transferred to paper or microform). ³ Retention: 1 month following reception of record.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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01 - ADMINISTRATION / ADMINISTRATION - GENERAL				
01.03	Working records			
Records used in the preparation of miscellaneous reports, memoranda, studies, policies, regulations, procedures, publications, etc. (drafts, notes or preliminary data, supporting documentation).				
copy	Unit	Active	Semi-active	Inactive
primary[a]	unit responsible	X ¹		D
secondary [a]	other units concerned	X ¹		D
Notes : (D = Destruction R = Retention)				
¹ Retention: 1 year following deposit or dissemination of the record's final version.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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01 – ADMINISTRATION / ADMINISTRATION - GENERAL	
01.04	Reference files

Files whose subject matter may vary from unit to unit according to need and specific activities. These files comprise the working or support records of a given unit relating to its specific activities and required for reference purposes in its operations. They may contain records of internal or external origin (magazine articles, press clippings, folders, brochures, extracts from books, reports and outside publications, catalogues, technical reference records, etc.).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		D
secondary [a]	other units concerned	X ¹		D

Notes :
(D = Destruction R = Retention)

¹ Retention: 1 year following completion of the file subject activity.
Note: Such records do not necessarily constitute archives within the meaning of the *Quebec Archives Act* R.S.Q. c.A21.1, but may be used as support records in the course of the activities of the institution or of one of its components (they should be destroyed as soon as the information contained in them is no longer useful or relevant).

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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01 – ADMINISTRATION / ADMINISTRATION – GENERAL				
01.05	Subject files, ad hoc files			
Files dealing with a specific subject and consolidating various records relating to the activities of the institution or of one of its components: correspondence, reports, studies, statistics, discussion papers, comments, etc. (this schedule applies only to files whose contents are not covered by a specific retention schedule).				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	X ¹		D
Notes : (D = Destruction R = Retention)				
¹ Retention: Until the file subject activity has been completed. ² Archives selection: Retention of records that significantly document the direction and development of main activities of the institution or of one of its components.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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01 – ADMINISTRATION / ADMINISTRATION – GENERAL
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<u>01.06</u>	Liaison files			
Correspondence received or sent regarding invitations, acknowledgements, congratulations, good wishes, condolences, etc. Also includes routing slips, memoranda, acknowledgements of receipt, certified copies and all liaison records that could be part of specific administrative files.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		D
secondary [a]	other units concerned	X ²		D
Notes : (D = Destruction R = Retention)				
¹ Retention: 3 months after sending record. ² Retention: 3 months after receiving record.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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01 – ADMINISTRATION / ADMINISTRATION – GENERAL				
01.07	Lists and inventories			
Records used in ongoing management: inventories, mailing and distribution, directories, catalogues, etc. (this schedule applies only to files whose contents are not covered by a specific retention schedule).				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		D ²
secondary [a]	other units concerned	X ¹		D
Notes : (D = Destruction R = Retention)				
¹ Retention: As long as the record is operative or until its replacement by a new version.				
² Destruction: Inventories, lists and other similar records having research value are covered by specific retention schedules.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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01 – ADMINISTRATION / ADMINISTRATION – GENERAL

01.08

Chronological correspondence

Files, registers, or logs comprising correspondence in chronological order sent by a unit for follow-up or to document its daily activities or performance.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R ¹

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retention of management's chronological correspondence registers to the extent that they significantly document the evolution of activities related to the institution's mandate (if quantities justify, transfer to microfilm and destroy paper records).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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01 – ADMINISTRATION / ADMINISTRATION – GENERAL

01.09

Appointments

Lists of persons occupying management positions or who participate in the institution's various bodies, committees, boards or associations.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: Until replacement by a new version.

² Archives selection: Retention of an annual appointments log profile.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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01 – ADMINISTRATION / ADMINISTRATION – GENERAL

01.10

Elections

Records dealing with the organization of elections, consultations or referenda: organization of balloting, election procedures, signs and posters, lists of nominees, ballots, forms relating to vote counting, results, minutes of election committee (if applicable), correspondence, etc..

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		R ²
secondary [a]	other units concerned	X ³		D

Notes :

(D = Destruction R = Retention)

¹ Retention: 1 year following confirmation of results (ballots to be destroyed immediately following expiry of deadline for challenges).

² Archives selection: For elections or consultations leading to appointments of members of the institution's management, retention of election committee minutes, list of electoral college members, returning officer's report, election procedure and significant correspondence (or equivalent in the case of a referendum). Destruction of election support records.

³ Retention: Until confirmation of results.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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01 – ADMINISTRATION / ADMINISTRATION – GENERAL

01.11

Participation in outside organizations

Miscellaneous records relating to activities of external organizations that maintain relations with the institution or with one of its components (representation on committees, in joint activities, etc.). Includes correspondence, printouts, minutes and any records created or received in the course of such activities.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	1 year		D

Notes :

(D = Destruction R = Retention)

1

Archives selection: Retention of correspondence, reports and all records documenting significant exchanges between the institution and outside organizations. Retention of records prepared and submitted by representatives of the institution, documenting its active participation or reflecting its institutional positions. Destruction of documentation or records accumulated for information purposes that do not refer to the institution's participation.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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01 – ADMINISTRATION / ADMINISTRATION – GENERAL

01.12

Calendar of activities

Records that indicate, for a definite period, the date of certain activities or events connected to the life of the institution or one of its components: calendars, programs, timetables, schedules, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	X ²		D

Notes :

(D = Destruction R = Retention)

1

Archives selection: Retention of calendars or programs that significantly illustrate activities directly related to the mandate of the institution or one of its components.

2

Retention: Until the end of the period concerned.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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01 – ADMINISTRATION / ADMINISTRATION – GENERAL

01.13

Inquiries

Correspondence addressed to the institution by persons or outside organizations requesting general or specific information about the institution's operations or activities.

Copy	Unit	Active	Semi-active	Inactive
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primary [a]	unit responsible	X ¹		D
secondary [a]	other units concerned	X ²		D
Notes : (D = Destruction R = Retention) ¹ Retention: 1 year after closing file. ² Retention: Until closing of file.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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01 – ADMINISTRATION / COMMITTEES				
01.14	Minutes and resolutions – Electronic records			
Minutes and resolutions adopted during meetings of the institution’s various bodies, boards, committees or working groups (tools developed to retrieve contents of minutes and resolutions are covered by a specific schedule, see 01.31).				
Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹		D ²
secondary [c]	other units concerned	X ³		D
Notes : (D = Destruction R = Retention)				
¹ Retention: Until the final version of minutes is adopted or until the files (minutes and resolutions) can be accessed directly in a computerized retrieval system.				
² Destruction: Research value ensured by retention of original records on paper or microfilm (see schedule 01.15).				
³ Retention: Until next meeting of committee concerned.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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01 – ADMINISTRATION / COMMITTEES	
<u>01.15</u>	Committees – General
Records documenting the functioning of meetings of the institution's various bodies, boards, committees or working groups (organization, discussions, deliberations, follow-up): schedule of meetings, notices of meetings, agendas, minutes, status reports, documents discussed, adopted or filed for information, resolutions, documentation required for meeting preparation, taking of minutes and requests for corrections.	

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

¹ Retention: 1 year after adoption of minutes.

² Archives selection: Retention of minutes and records pertaining to institution bodies and committees, as well as official copies of resolutions. Destruction of records relating to meeting preparation (proposed agenda items, notification of meeting, etc.). Destruction of records relating to ad hoc, non-statutory committees and working groups, records of whose main activities and achievements are found in the minutes, related records or other records or files of a body at a higher level.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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01 – ADMINISTRATION / COMMITTEES

01.16

Committees – Appointments

Records dealing with the appointment of members of the institution to internal or external bodies and committees (boards, commissions, committees, working groups, outside representation, etc.): correspondence, notice of expiry of term, appointment procedures, documentation on application of these procedures, appointments lists, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: 3 years or period equivalent to length of terms, whichever is longer.

² Archives selection: Retention of cumulative list of appointments and appointment procedures. Destruction of support records.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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01 - ADMINISTRATION / HISTORICAL, CONSTITUTIVE AND REGULATORY RECORDS

01.17

Historical

Records dealing with the founding, historical evolution (growth and orientation) of the institution and its various components; and or document the history of the institution or specific events that have marked its development (historical celebrations, special anniversaries, commemorative ceremonies, unveiling of a plaque or monument, etc.). Including particular texts, manuscript notes, chronologies, publications and other records relating in whole or in part to the history of the institution, its components and its members.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of records that substantively document the history of the institution or one of its components. Destruction of notes and working records.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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**01 - ADMINISTRATION /
HISTORICAL, CONSTITUTIVE AND REGULATORY RECORDS**

01.18 Charter, statutes, letters patent

Official records providing proof of the institution's constitution (or amendments to its statutes) and set out its rights, privileges and obligations. This schedule also covers all of the amendments made to the institution's constitutive records.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		R
secondary [a]	other units concerned	X ²		D

Notes : (**D** = Destruction **R** = Retention)

¹ Transfer to archives.
² Retention: As long as the records are in effect.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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**01 - ADMINISTRATION /
HISTORICAL, CONSTITUTIVE AND REGULATORY RECORDS**

01.19

Regulations, by-laws

Records comprising the schedules governing the institution's organization and operations: general regulations (for the administrative and pedagogical activities of the whole institution) and specific regulations (for the activities of the various components).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: As long as records are in effect or until replacement by a new version.

² Archives selection: Retention of official version (and of all updates) of various regulations or by-laws.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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**01 - ADMINISTRATION /
HISTORICAL, CONSTITUTIVE AND REGULATORY RECORDS**

01.20

Honorary distinctions

Records dealing with the various distinctions conferred by the institution: honorary doctorates, medals, diplomas for artistic or scientific excellence, titles of professor emeritus, chancellor, etc. Files may contain the following records: curriculum vitae of candidates and recipients, letters of support, presentation texts, thank-you speeches, press releases, speeches by members of the institutions, invitations, correspondence, extracts of minutes of the body approving the conferring of the distinction, copies of diplomas or certificates awarded, lists of recipients, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retention of list and files of recipients (curriculum vitae, date and nature of honour conferred, filed of activity, discipline), methods of conferral, records describing the procedure of awards ceremonies, lists of unsuccessful candidates, copies of certificates and degrees awarded. Destruction of unsuccessful candidates' files and non-essential support documents.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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01 – ADMINISTRATION / PLANNING, ORGANIZATION AND INTERNAL GOVERNANCE

01.21

Administrative planning

Records establishing the priorities and orientations of the institution and its various components: annual, three-year and five-year corporate plans, planning of general and specific objectives for administrative units.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	R ³
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: 1 year following period covered by planning document.

² Retention: 1 year or a period equivalent to the period covered by the planning document.

³ Archives selection: Retention of final versions of plans, summary records establishing specific and general objectives of the institution's units and studies completing such records. Destruction of working files.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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01 – ADMINISTRATION / PLANNING, ORGANIZATION AND INTERNAL GOVERNANCE

01.22

Policies, procedures

Internal governance records (general or specific) drawn up by the institution or one of its components with the object of guiding actions to be undertaken, providing steps to be followed, specifying means to be used to carry out activities necessary to attain the institution's goals: policies, procedures, standards, directives, administrative practices.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: As long as records are in effect or until replacement by a new version.

² Archives selection: Retention of official versions (and all updates) of policies, procedures, standards, directives and administrative practices prepared by the institution or one of its components that document the process of carrying out its various activities. Destruction of working files and extremely specific procedures.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other



01 – ADMINISTRATION / PLANNING, ORGANIZATION AND INTERNAL GOVERNANCE

01.23

Delegation of authority

Records arising from the distribution and delegation of authority within the institution. This schedule also applies to financial and signing authority (certification identifying persons delegated to sign certain documents).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	D ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: 1 year following end of the delegation.

² Destruction: Delegations approved by the institution's decision-making bodies to be kept with the records of those bodies.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other



01 – ADMINISTRATION / PLANNING, ORGANIZATION AND INTERNAL GOVERNANCE

01.24

Administrative organization and structure

Records dealing with the definition and evolution of the mandates and administrative structure of the institution and its various components (distribution of mandates and management of organizational structure: identification of units, sub-units, functions, types and number of positions and reporting relationships). This schedule also includes reports, studies and organizational or structural analyses (re-evaluation of mandates, restructuring, creation, closing and amalgamation of administrative units, etc.).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes :		(D = Destruction R = Retention)
¹ Retention: As long as records are in effect. ² Archives selection: Retention of official versions of mandates and organizational structures and final version of analyses and reports documenting the development of administrative responsibilities, organization of the work and structure of the institution or one of its components. Destruction of drafts and organizational structures not adopted.		
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other		
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01 – ADMINISTRATION / PLANNING, ORGANIZATION AND INTERNAL GOVERNANCE				
01.25	Client services			
Records dealing with the definition, allocation, evaluation and review of client services provided by the institution and its various components: list and description of services, definition of target clientele’ needs, statistics on use of services, etc.				
copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	1 year		R ²
Notes :		(D = Destruction R = Retention)		
¹ Retention: Until next evaluation or redefinition of services provided by the unit.				
² Archives selection: Retention of studies, reports and analyses significantly documenting services provided by the different units. Destruction of support records (drafts, preliminary versions, etc.).				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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01 – ADMINISTRATION / PLANNING, ORGANIZATION AND INTERNAL GOVERNANCE				
01.26		Evaluation of units		
Records dealing with evaluation or organizational development activity in one of the institution’s units. The file may include the following records: evaluation or action mandate and procedure, correspondence, unit self-evaluation, satisfaction survey, comparisons with other institutions, target-group consultations, and evaluation reports.				
copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R ¹

secondary [a]	other units concerned	x ²		D
Notes : (D = Destruction R = Retention)				
¹ Archives selection: Retention of summary reports and records documenting the objectives, process and results of the evaluation, consultation or action (self-evaluation reports, survey reports, client comments, final report, significant correspondence). Destruction of support records. ² Retention: Until completion of the evaluation or action.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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01 – ADMINISTRATION / REPORTS AND STATISTICS				
01.27	Activity reports			
Records composed of qualitative and quantitative data summarizing the activities of the institution or one of its components over a definite time period.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	1 year		D
Notes : (D = Destruction R = Retention)				
1 Archives selection: Retention of cumulative and summary reports that document substantively the main achievements of the institution or component on an annual basis or at more frequent intervals in the absence of annual data.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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01 – ADMINISTRATION / REPORTS AND STATISTICS				
<u>01.28</u>	Studies and analyses			
Records created by the institution or one of its components summing up issues pertaining to some aspect of activities management (this schedule applies only to studies and analyses whose subject-matter is not covered by a specific retention schedule).				
copy	Unit	Active	Semi-active	Inactive

primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	1 year		D
Notes : (D = Destruction R = Retention)				
¹ Archives selection: Retention of studies and analyses bearing on subjects directly related to the mission, mandate or activities of the institution or one of its components.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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01 – ADMINISTRATION / REPORTS AND STATISTICS				
<u>01.29</u>	Statistics			
Records containing statistical data concerning various aspects of the administrative and academic management of the institution or one of its components.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	1 year		D
Notes : (D = Destruction R = Retention)				
¹ Archives selection: Retention of cumulative and summary statistics showing the development of the main activities of the institution or one of its components on an annual basis or a more frequent basis in the absence of annual data. Destruction of working records and or other records whose data has been used or summarized in final versions of statistical reporting.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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01 – ADMINISTRATION / REPORTS AND STATISTICS	
<u>01.30</u>	Inquiries and surveys

Records related to the design and execution of inquiries or surveys for the institution or one of its components: correspondence, questionnaires, data interpretation reports, final reports and various other documents.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	2 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: 1 year after analysis of survey or publication of results.

² Archives selection: Retention of records relating to inquiries or surveys documenting the orientation and development of the main activities of the institution or one of its components (retention of final report and one specimen of the questionnaire used if not contained in final report). Destruction of working records (copies of questionnaires, preliminary reports etc.).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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01 – ADMINISTRATION / ADMINISTRATIVE RECORDS MANAGEMENT

01.31

Administrative records management – Electronic records

Data used in the management of administrative records of the institution and its components: records classification, management of essential records, minutes, forms and semi-active records, retention schedule management, inventories of microfilm or digital records, records disposal monitoring, etc..

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹		R ²

Notes : (D = Destruction R = Retention)

¹ Retention: As long as the system exists (data are updated regularly).

² Archives selection: Retention of records concerning series designated for permanent retention (archives) including but not exclusive to minutes, resolutions, microfilm or digital archives, and retired retention schedules. Records that cannot be maintained electronically should be preserved on paper or microfilm.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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01 – ADMINISTRATION / ADMINISTRATIVE RECORDS MANAGEMENT**01.32****Records classification**

Records relating to the development, establishment and use of the institution's records classification system, set-up procedures, information files on status of job classifications, list of unit administrative records, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

- ¹ Retention: As long as classification system is in effect (or entered in a filing unit) or until the replacement of a record by a new version.
Destruction of working forms after use.
- ² Archives selection: Retention of classification plan for administrative records of the institution or one of its components (and all updates).

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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**01 – ADMINISTRATION / ADMINISTRATIVE RECORDS MANAGEMENT****01.33****Essential or vital records management**

Records relating to the institution's essential or vital records program including but not limited to: lists/inventories of essential/vital records, security and protective measures adopted, handling procedures, records circulation control, etc..

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		D
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

- ¹ Retention: As long as essential/vital records management plan is in effect or until the replacement of a record by a new version.
Destruction of working forms after use.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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01 – ADMINISTRATION / ADMINISTRATIVE RECORDS MANAGEMENT

01.34

Management of minutes

Records relating to the institution's management of minutes: committee lists, inventories of minutes, lists of resolutions, indexing schedules, records consultation control forms, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: As long as the management program for minutes is in effect or until the replacement of a record by a new version. Destruction of working forms after use.

² Archives selection: Retention of lists of committees and cumulative inventory of minutes.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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01 – ADMINISTRATION / ADMINISTRATIVE RECORDS MANAGEMENT

01.35

Forms management

Records relating to the program of managing the institution's forms (analysis, design, production and distribution): requests for production of forms, design and lay-out sketches(roughs), originals of masters (print-ready), orders, inventories, distribution forms, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	D
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: As long as form is in use (reprint requisitions and records can be eliminated after 2 years).

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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01 – ADMINISTRATION / ADMINISTRATIVE RECORDS MANAGEMENT

01.36

Records retention and disposal schedules

Records relating to the development, set-up and use of the institution's records retention and disposal schedules: lists of inactive records, schedule development files (proposed schedules, references, documentation), approval forms, retention schedules distributed to units (general or specific).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: As long as retention schedules are in force (list of inactive records transferred to Archives).

² Archives selection: Retention of retention schedule approval forms, cumulative version of retention schedules and lists of inactive records. Destruction of working records

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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01 – ADMINISTRATION / ADMINISTRATIVE RECORDS MANAGEMENT

01.37

Semi-active records management

Records relating to the institution's semi-active records management program: lists of units, forms for the transfer, and bringing forward or final withdrawal of semi-active records.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		R ²
secondary [a]	other units concerned	X ³		D

Notes : (D = Destruction R = Retention)

¹ Retention: As long as records are kept in semi-active records depository. Forms for bringing forward records are eliminated after 1 year.

² Archives selection: Retention of transfer forms for boxes of records to be selected or preserved in toto in archives. Destruction of transfer forms for boxes of records that are destroyed, final withdrawal forms and support records.

³ Retention: As long as records are preserved in semi-active records depository.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other



01 – ADMINISTRATION / ADMINISTRATIVE RECORDS MANAGEMENT

01.38

Micrographics and digitizing

Records relating to the operations of micrographics and digitizing of the institution's administrative records: project files, description of records concerned, notes, evaluation and feasibility reports, technical execution reports, designation of persons authorized to reproduce records, reproduction certificates, sworn declarations (reproduction and destruction of records), destruction notifications, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		R ²
secondary [a]	other units concerned	X ¹		D

Notes :

(D = Destruction R = Retention)

¹ Retention: As long as micrographics and digitizing project is operative.

² Archives selection: Retention of records certifying designations of persons authorized to reproduce records, sworn declarations, and records pertaining to the reproduction and destruction of records. Destruction of planning and project execution files.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other



01 – ADMINISTRATION / ADMINISTRATIVE RECORDS MANAGEMENT

01.39

Records destruction

Records relating to the destruction process for the institution's administrative records: notifications of destruction, destruction authorization forms, forms for collection and destruction of confidential records, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	3 years		R ¹
secondary [a]	other units concerned	X ²		D

Notes :		(D = Destruction R = Retention)
¹ Archives selection: Retention of destruction notification and destruction authorization forms. Destruction of certificates of collection and destruction of confidential records. ² Retention: 1 year after destruction of records.		
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other		
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01 – ADMINISTRATION / LEGAL AFFAIRS				
01.40	Government legislation, orders and regulations			
Acts, orders and regulations impacting or affecting the general operations or specific activities of the institution or one of its components.				



01 – ADMINISTRATION / LEGAL AFFAIRS				
<u>01.41</u>	Intellectual property – Electronic records			
Records created and accumulated for purposes of managing and monitoring copyrights resulting from the sale or use of publications produced or acquired by the institution as well as rights related to patents, trade marks and industrial designs registered by the institution.				
Copy	Unit	Active	Semi-active	Inactive

primary [c]	unit responsible	X ¹		D ²
Notes : (D = Destruction R = Retention) ¹ Retention: As long as the system exists (data updated regularly). ² Destruction: Authorized where research integrity is ensured by retention of records on paper in archives (see schedules 01.42 , 01.44 , 01.45 and 01.46).				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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01 – ADMINISTRATION / LEGAL AFFAIRS				
01.42	Copyright			
Records relating to copyright for works produced or acquired by the institution. Applies equally to records containing assignments of rights, licences or authorizations relating to copyright in the institution’s name for manuscripts, software, photographs and audio or video recordings.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	R ³
secondary [a]	other units concerned	1 year		D
Notes : (D = Destruction R = Retention)				
¹ Retention: As long as assignments of rights, licences or authorizations are in effect.				
² Retention: 50 years following author’s death.				
³ Archives selection: Retention of official records relating to copyrights of works produced or acquired by the institution. Destruction of records containing assignments of rights, licences or authorizations relating to copyright in the institution’s name.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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01 – ADMINISTRATION / LEGAL AFFAIRS	
01.43	Legal deposit
Records relating to the legal deposit in the National Library of Canada and the Bibliothèque nationale du Québec of documents published by the institution: correspondence, administrative forms, certificates of legal deposit. This schedule covers records relating to the legal deposit of publications, notices, brochures, maps and plans, electronic documents, audio recordings, prints, reviews, software, microforms, musical scores and journals published by the institution or one of its components.	

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	1 year		R ¹
Notes : (D = Destruction R = Retention)				
¹ Archives selection: Retention of certificates of legal deposit. Destruction of correspondence related to process of legal deposit.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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01 – ADMINISTRATION / LEGAL AFFAIRS				
01.44	Patents			
Records relating to patents to which the institution holds the rights. This schedule also covers records prior to application for patent.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	R ³
secondary [a]	other units concerned	X ¹		D
Notes : (D = Destruction R = Retention)				
¹ Retention: As long as the patent is in effect.				
² Retention for a period of 17 years from patent date (if application was made prior to October 1, 1989).				
³ Archives selection: Retention of certificate of granting of patent and records prior to application for patent. Destruction of correspondence related to the application and issuing of certificate.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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01 – ADMINISTRATION / LEGAL AFFAIRS	
01.45	Trademarks

Records establishing the legal ownership of trademarks in the institution's name.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	R ³

Notes : (**D** = Destruction **R** = Retention)

- ¹ Retention: Until certificate of trademark registration obtained.
² Retention: 15 years following last renewal of trademark registration.
³ Archives selection: Retention of trademark certificate. Destruction of correspondence related to application for issue of certificate.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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01 – ADMINISTRATION / LEGAL AFFAIRS

01.46

Registration of industrial designs

Records establishing the legal ownership of industrial designs in the institution's name.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	R ³

Notes : (**D** = Destruction **R** = Retention)

- ¹ Retention: Until certificate of registration of industrial design is obtained.
² Retention: 10 years following the last renewal of industrial design registration.
³ Archives selection: Retention of industrial design certificate. Destruction of correspondence related to application and issuing of certificate.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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01 – ADMINISTRATION / LEGAL AFFAIRS

01.47

Legal opinions and advice

Records containing legal opinions and advice relating to the conduct of the institution's operations (interpretation of legislation, regulations, contracts, etc.).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary[a]	other units concerned	X ³		D

Notes : (D = Destruction R = Retention)

¹ Retention: Until settlement of the issue or as long as the legal advice remains in force or operative.

² Archives selection: Retention of final version of legal advice and opinions as well as the case law directly related to these records.
Destruction of non-essential, working or support records.

³ Retention: Until settlement of the issue.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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01 – ADMINISTRATION / LEGAL AFFAIRS

01.48

Legal proceedings

Records relating to legal matters dealt with or submitted to a court of law or an administrative tribunal for or against the institution: legal correspondence and pleadings, statements, demands, directions, defence, actions, subpoenas and notices to appear, orders, discharges, garnishments, rulings, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	R ³
secondary [a]	other units concerned	X ⁴		D

Notes : (D = Destruction R = Retention)

¹ Retention: Until settlement of the case (conclusion of proceedings, including rights to appeal, or until execution of judgement).

² Retention: 10 years for records involving the institution after January 1, 1994; 30 years for records relating to legal proceedings involving the institution prior to December 31, 1993.

³ Archives selection: Retention of records relating to legal proceedings with a major impact on university life, relations with clients or the institution's activities: procedures, exhibits, certified transcripts of out-of-court testimony, written submissions, arguments, transactions, discharges, etc.

⁴ Retention: Until settlement of the case.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other



01 – ADMINISTRATION / LEGAL AFFAIRS

[01.49](#)**Public liability insurance**

Records relating to agreements whereby, for a premium, insurers agree to indemnify the institution or one of its components in the case of incidents covered by an insurance policy (fire, theft, damage, etc.): insurance proposal, insurance contract, records relating to competitive bids, renewal of insurance policies, claims, settled claims. etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	10 ²	D ³
secondary [a]	other units concerned	X ⁴		D

Notes : (D = Destruction R = Retention)

¹ Retention of official records relating to insurance (contracts, riders, etc.): as long as the policy is in effect (records relating to claims are kept in the office until the claim is settled).

² Retention: 10 years following expiry of the insurance policy or until complete settlement of all claims relating to the insurance.

³ Destruction. Policies relating to group insurance are kept in Archives and are covered under a separate schedule (see schedule [02.20](#)).

⁴ Retention: Until settlement of the claim.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other



01 – ADMINISTRATION / LEGAL AFFAIRS

[01.50](#)**Minor claims**

Records relating to minor claims brought either by or against the institution involving the payment of a sum of money or the execution of a judgement following material or bodily damages, losses or thefts of material, accidents, property damage, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	10	R ³
secondary [a]	other units concerned	X ⁴		D

Notes :		(D = Destruction R = Retention)
¹ Retention: Until settlement of the claim. ² Retention: 10 years following settlement of claim. ³ Archives selection: Retention of records summarizing the circumstances and process of settlement of minor claims with a significant effect on the institution's activities. Destruction of records relating to frequent or very specific minor claims, working records and non-essential correspondence. ⁴ Retention: Until settlement of the claim.		
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other		
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01 – ADMINISTRATION / LEGAL AFFAIRS				
01.51	Major claims			
Records relating to major claims brought by or against the institution (mainly involving insurance companies), concerning the payment of major damages or the execution of a judgement following significant damages suffered by the institution or one of its units (defects in construction, etc.).				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	10 ²	R ³
secondary [a]	other units concerned	X ⁴		D
Notes :		(D = Destruction R = Retention)		
¹ Retention: Until settlement of the claim.				
² Retention: 10 years following settlement of the claims.				
³ Archives selection: Retention of summary records or, in their absence, specific records dealing with the circumstances and process of settlement of a major claim. Destruction of working or support records and non-essential correspondence.				
⁴ Retention: Until settlement of the claim.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
PREVIOUS SCHEDULE NEXT SCHEDULE				
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01 – ADMINISTRATION / LEGAL AFFAIRS	
01.52	Minor contracts

Legal records confirming a minor agreement between the institution and an individual or a corporate entity related to the administrative or academic management of the institution: contracts for minor purchases, services, rentals, articles, loans, inter-university loans, co-operation agreements, etc. This schedule also covers records associated with minor contracts.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	10 ²	R ³
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: Until expiry of the contract.

² Retention: 10 years following expiry of contract or its last renewal.

³ Archives selection: Retention of official records related to minor contracts having a significant bearing on the life of the university and the institution's administrative activities: partnership agreements, affiliation agreements, significant teaching or research contracts, contracts for the development of special programs, etc. Destruction of substantiating records (preliminary versions, working notes, records of transmission, etc.).

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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01 – ADMINISTRATION / LEGAL AFFAIRS

01.53

Major contracts

Legal records confirming major agreements between the institution and an individual or corporate body, related to the purchase of a building or property, construction of a building and other instances of similar importance: contracts, agreements or covenants, title deeds, deeds of sale or purchase, easements, localization certificates, leases, tenders, preliminary studies and estimates, quotations, specifications, plans, correspondence, records relating to indemnities for expropriations and all records associated with major contracts.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	10 ²	R ³
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: Until end of contract (end of construction work, registration of transfer of buildings, property, etc.).

² Retention: 10 years after expiry of the term of the contract.

³ Archives selection: Retention of official records related to major contracts. Destruction of substantiating records (preliminary versions, working notes, records of transmission, etc.).

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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01 – ADMINISTRATION / LEGAL AFFAIRS

01.54

Licences and permits

Records relating to government licence and permits necessary to the conduct of the institution's affairs.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: As long as the license or permit is valid.

² Archives selection: Retention of the records most representative of the institution's activities (example: building permits). Destruction of records issued in the course of very specific activities (example: alcohol permit for a reception).

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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01 – ADMINISTRATION / LEGAL AFFAIRS

01.55

Requests for access to public records

Records relating to requests for access to the institution's public records in compliance with the *Act respecting documents held by public bodies and the protection of personal information R.S.Q. A-2.1*: requests for access, acknowledgements of receipt, replies from the person responsible for access to records, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	R ³
secondary [a]	other units concerned	X ⁴		D

Notes : (D = Destruction R = Retention)

¹ Retention: Until closeout of the file (conclusion of procedures, including rights to appeal, or until execution of judgement, if applicable).

² Retention: 10 years in the case of requests addressed to the institution after January 1, 1994; 30 years in the case of records related to requests made to the institution before December 31, 1993 (requests that simply elicited a response by the person responsible for access to records are kept for 10 years).

³ Archives selection: Retention of decisions by the Commission d'accès à l'information du Québec (Quebec's access commission) specifically relating to the institution.

⁴ Retention: Until closeout of the file.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other



01 – ADMINISTRATION / LEGAL AFFAIRS

[01.56](#)**Requests for personal information**

Files comprising various records relating to requests for personal information held by the institution in compliance with the *Act respecting documents held by public bodies and the protection of personal information* R.S.Q. A-2.1 : requests for access, correction or review, acknowledgements of receipt, replies from the person in charge of access to records, etc.

Copy	Unit	Active	Semi-active	Inactive
Primary [a]	unit responsible	X ¹	X ²	R ³
Secondary [a]	other units concerned	X ⁴		D

Notes : (D = Destruction R = Retention)

¹ Retention: Until closeout of the file (until conclusion of procedures including rights to appeal, if applicable).

² Retention: 10 years in the case of requests addressed to the institution after January 1, 1994; 30 years in the case of requests made before December 31, 1993 (requests that simply elicited a response by the person responsible for access to records are kept for 10 years).

³ Archives selection: Retention of decisions of Quebec's access commission specifically relating to the institution.

⁴ Retention: Until closeout of the file.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other



01 – ADMINISTRATION / LEGAL AFFAIRS

[01.57](#)**Personal information files management**

Records relating to the management of personal information files kept by the institution: declarations of personal information files to Quebec's access commission, agreements between public bodies for the transmission of personal information, authorizations by Quebec's access commission, personal information file consultation logs, etc..

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	10 ²	R ³

Notes :

(**D** = Destruction **R** = Retention)

- ¹ Retention: As long as the records are in effect or until their replacement by a new version.
² Retention: 10 years following the end of file use (or replacement of records by a new version).
³ Archives selection: Retention of agreements between public bodies for the transmission of identifying information and authorizations by Quebec's access commission.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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end of category: 01 - Administration



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02 - HUMAN RESOURCES

02 - HUMAN RESOURCES / STAFFING				
02.01	Position management – Electronic records			
Data used in the management of employment positions: incumbents, position status, job descriptions, position groups, benefit plans, start dates, position titles, classifications, salaries, etc.				
		</		



02 - HUMAN RESOURCES / STAFFING				
02.02	Staff and position management			
Records dealing with the planning, inventory, evaluation, and changes in staffing: studies, analyses, reports and recommendations on personnel requirements and position status, creation, evaluation, classification, distribution, abolition and transfer of positions, staffing plans, position inventories and structures, staff hiring plans, staff lists, seniority lists, etc.				
Copy	Unit	Active	Semi-active	Inactive

primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D
Notes : (D = Destruction R = Retention) ¹ Retain as long as records are in effect or until replacement by a new version. ² Archives selection: Retain official staff plans, hiring plans specific to the institution, cumulative records of positions, cumulative lists of staff and seniority, as well as reports and studies on the creation, transfer or abolition of positions. Destroy support documents (periodic non-official lists, incomplete reports, etc.). [] = medium--->a = paper b = microfilm c = electronic d = audio-visual e = other				
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02 - HUMAN RESOURCES / STAFFING				
02.03	Staff functions			
Records relating to the definition of employee functions and duties: job and duty descriptions, work plans, allocation of administrative, teaching and other duties, external professional activities, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ¹		D
Notes : (D = Destruction R = Retention)				
¹ Retain as long as records are in effect or until replacement by a new version.				
² Archives selection: Retain official descriptions of functions and duties of personnel, work plans or reports documenting division of teaching duties, duties other than teaching and outside professional activities of teaching staff. Destruction of support records (work forms, preliminary lists, etc.).				
[]= medium--->a = paper b = microfilm c = electronic d = audio-visual e = other				
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02 - HUMAN RESOURCES / STAFFING				
02.04	Staff recruitment – Electronic records			
Data used in the follow-up of postings of position openings: position identifications, candidate information (evaluations, seniority classifications, etc.).				
Copy	Unit	Active	Semi-active	Inactive

primary [c]	unit responsible	X ¹		D ²
Notes : (D = Destruction R = Retention) ¹ Retention 1 year after closing of position staffing process. ² Destruction: Research value ensured by retaining the following records on paper: official staff plans, hiring plans, cumulative position logs, cumulative staff and seniority lists (schedule 02.02), job offers, hiring criteria, management and regular teaching staff recruiting files (schedule 02.05). [] = medium--->a = paper b = microfilm c = electronic d = audio-visual e = other				
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02 – HUMAN RESOURCES / STAFFING				
02.05	Staff recruitment			
Records relating to staffing competitions: personnel requisitions, job descriptions, hiring criteria and qualification requirements, job vacancy notices, recruiting files, job offers, announcements or advertisements, postings, offers of service and job applications, curriculum vitae, invitations to interview, evaluation guides, tests and results, selection grids, summaries of interviews, selection committee reports, correspondence, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	R ³
secondary [a]	other units concerned	X ¹		D
Notes : (D = Destruction R = Retention)				
¹ Retention 1 year following end of competition or until settlement of last grievance associated with recruiting process.				
² Retention 2 years or as long as recruiting process can be contested (according to the terms of the collective agreement concerned).				
³ Archives selection: Retain offers of employment, hiring criteria, recruiting files for management and regular teaching staff. Destruction of other recruiting files, outdated evaluation tests and support records.				
[]= medium--->a = paper b = microfilm c = electronic d = audio-visual e = other				
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02 - HUMAN RESOURCES / STAFFING	
02.06	Staff hiring

Records necessary for the hiring or appointment of staff: hiring procedures and statistics, standards used in negotiating and establishing special hiring conditions and methods of integrating new staff, orientation guides, etc. (this does not cover hiring contracts filed in employee files, which are covered under separate schedules; see schedules 02.08 to 02.11).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention until records are replaced by a new version or until the end of a specific appointment process.

² Archives selection: Retain cumulative listings of appointments, procedures, standards, orientation guides for various personnel categories. Retain records documenting appointment management processes (election files are covered under a separate schedule). Destruction of support records.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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02 - HUMAN RESOURCES / PERSONNEL FILES

[02.07](#)

Personnel files – Electronic records

Data used in personnel management: sociological employee data, degree(s), experience, hiring dates, conditions of employment, career monitoring, staff movements, salaries, remuneration models, union affiliations, functions and duties, seniority, professional development, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹	X ²	D ³

Notes : (D = Destruction R = Retention)

¹ Retention 2 years following employee's departure (data updated regularly and normally cumulative).

² Retention until 100th anniversary of employee's birth.

³ Destruction: Research value ensured by retaining the following records on paper: employee files, employment offers, staff plans, staff lists, seniority lists, duty and responsibility descriptions, work plans, outside professional activities, cumulative files of professional activities, etc. (see schedules [02.02](#), [02.03](#), [02.05](#), [02.08](#) and [02.10](#)).

[] = medium---> a = paper b = microfilm c = electronic d = audio-visual e = other

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02 - HUMAN RESOURCES / PERSONNEL FILES

[02.08](#)

Personnel files: Professors and lecturers

Records used in the management of academic staff (professors and lecturers): correspondence, contracts, curricula vitae, degree and experience certifications, salary and benefits progressions, professional activities, cumulative files of professional development activities, evaluations, promotions, duties, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	R ³
secondary [a]	other units concerned	X ⁴		D

Notes : (D = Destruction R = Retention)

- ¹ Retention 2 years following employee's departure.
² Retention until 100th anniversary of employee's birth (transfer of records to microfilm recommended).
³ Archives selection: Retain files of employees born in the years 01 and 06 of every decade and a selection of files of professors and lecturers particularly celebrated in their teaching, research or innovation field, who have received awards, recognition and other distinctions. Retain files in toto if transferred to microfilm (destruction of hard copies).
⁴ Retention 1 year following employee's departure.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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02 - HUMAN RESOURCES / PERSONNEL FILES

02.09

Personnel files: Auxiliary teaching staff

Records used in the management of auxiliary teaching staff (teaching or research assistants or instructors, markers, tutors, demonstrators): correspondence, contracts, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	D
secondary [a]	other units concerned	X ³		D

Notes : (D = Destruction R = Retention)

- ¹ Retention 2 years following employee's departure.
² Files of auxiliary teaching staff participating in the institution's benefits programs (insurance, pensions, etc.) are kept until the 100th anniversary of employee's birth.
³ Retention in office 1 year after employee's departure.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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02 - HUMAN RESOURCES / PERSONNEL FILES

02.10		Personnel files: Managerial, administrative and support		
Records used in the management of managerial, administrative and support staff: employment offers, curricula vitae, employment contracts, birth certificates, certifications of diplomas and experience, job descriptions, salary and benefits progressions, professional development activities, evaluations, promotions, correspondence (hiring, development, departures, resignations, etc.).				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	R ³
secondary [a]	other units concerned	X ⁴		D
Notes : (D = Destruction R = Retention)				
¹ Retention 2 years following employee's departure.				
² Retention until the 100th anniversary of employee's birth (transfer of records to microfilm recommended). Files of casual employees who do not participate in the institution's benefits programs (insurance, pensions, etc.) are retained 5 years then destroyed.				
³ Archives selection: Retain senior management files and files of administrative and support personnel born in the year 01 of each decade.				
⁴ Retention 1 year following employee's departure.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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02 - HUMAN RESOURCES / PERSONNEL FILES				
<u>02.11</u>		Personnel files: Student staff, interns		
Records relating to student employment (summer jobs, part-time student contracts, etc.) and internships: employment contracts, proofs of enrolment in a program of studies, internship plans, internship reports, evaluation sheets, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		D
secondary [a]	other units concerned	X ²		D
Notes : (D = Destruction R = Retention)				
¹ Retention 3 years following departure of student or intern.				
² Retention 1 year following departure of student or intern.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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02 - HUMAN RESOURCES / WORKING CONDITIONS AND BENEFITS

02.12		Work schedules		
Records relating to the management and control of personnel work schedules: timetabling, methods of application, requests to change work schedules, flexible hours controls, employee time management data capture and verification records (time sheets, punch cards, attendance sheets, performance reports), etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	1 year	5 years	D
secondary [a]	other units concerned	1 year		D
Notes : (D = Destruction R = Retention)				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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02 - HUMAN RESOURCES / WORKING CONDITIONS AND BENEFITS				
02.13		Payroll characteristics – Electronic records		
Data used in describing institution’s payrolls: teacher names and numbers, salary codes, etc.				



02 - HUMAN RESOURCES / WORKING CONDITIONS AND BENEFITS	
02.14	Payroll characteristics

Data or reports produced during the institution's payroll process. These records primarily show teacher numbers and names, salary codes, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	D
Notes : (D = Destruction R = Retention)				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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02 - HUMAN RESOURCES / WORKING CONDITONS AND BENEFITS				
02.15	Salary scales – Electronic records			
Data concerning the various salary scales used in salary transactions with institution employees.				



02 - HUMAN RESOURCES / WORKING CONDITIONS AND BENEFITS	
02.16	Salary scales and pay bases

Records relating to the institution's remuneration and salary scales: salary scales or bases of pay for different categories of employees, reports on salary increases, revisions of salary rates, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retain as long as records are in effect or until replacement by a new version.

² Archives selection: Retain salary scales and records relating to bases of remuneration of the institution's employees (except those that are found in collective agreements and other agreements with different categories of employees; these are retained in archives according to the provisions of schedule [02.38](#)). Destruction of reports, lists and support documents.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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02 - HUMAN RESOURCES / WORKING CONDITIONS AND BENEFITS

[02.17](#)

Benefits management – Electronic records

Data used in the management of the institution's employee benefits programs: enrolment in and contributions to benefits programs, time banks, leave monitoring (type, duration), etc.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹	X ²	D

Notes : (D = Destruction R = Retention)

¹ Retention 2 years after employee's departure. Data relating to time banks and leave taken may be destroyed 5 years after recording unless required for implementation of collective agreements (salary retroactivity, etc.).

² Retention until 100th anniversary of employee's birth.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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02 - HUMAN RESOURCES / WORKING CONDITIONS AND BENEFITS

<u>02.18</u>	Benefits management			
Records used in the management of personnel benefits: benefit contributions (employee, employer), reports on the administration and payment of benefits, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	D
secondary [a]	other units concerned	X ¹		D
Notes : (D = Destruction R = Retention)				
¹ Retain as long as records are in effect or until replaced by a new version.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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02 - HUMAN RESOURCES / WORKING CONDITIONS AND BENEFITS				
02.19	Absences and leaves			
Records used in managing staff absences and leaves: leave applications (illness, personal, death), notices and certifications of absence, notices of return, calendars, requests, vacation notices and authorizations, employee absence profiles, absence reports, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	D
secondary [a]	other units concerned	1 year		D
Notes : (D = Destruction R = Retention)				
¹ Retention 1 year. Records relating to leaves without pay, maternity leaves, deferred or planned leaves are normally placed in employee files; these are covered in separate schedules (see schedules 02.08 to 02.11).				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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02.20		Group insurance		
Records relating to the administration of group insurance plans (life, salary, accident, illness, dental, etc.): contracts and amendments, lists of insured parties, renewals, premium billings, claims, correspondence, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	R ³
secondary [a]	other units concerned	1 year		D
Notes : (D = Destruction R = Retention)				
¹ Retain as long as insurance plans are in effect, until all claims are settled or as long as there are beneficiaries or successors (to the extent that it is possible to benefit from the plan). Retain insurance claims in office 1 year.				
² Retention 10 years after closing file.				
³ Archives selection: Retain group insurance policies, contracts and amendments. Destruction of claims and support records (billings, etc.).				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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02 - HUMAN RESOURCES / WORKING CONDITIONS AND BENEFITS

02.21

Salary insurance – Electronic records

Data used in employee salary insurance programs: payable hours, employee benefit histories, claims and compensation, payment transactions, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	2 years	X ¹	D

Notes : (D = Destruction R = Retention)

Retention 4 years or as long as data are required for application of collective agreements (salary retroactivity, etc.).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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02 - HUMAN RESOURCES / WORKING CONDITIONS AND BENEFITS

<u>02.22</u>		Salary insurance – Employees		
Records relating to employee salary insurance benefit claims.				
Copy	Unit	Active	Semi-active	Inactive
Primary [a]	unit responsible	X ¹	X ²	D ³
Notes : (D = Destruction R = Retention)				
¹ Retention 2 years after closing file. ² Retention 4 years or as long as records are required for application of collective agreements (salary retroactivity, etc.). ³ Destruction: Cumulative reports of data relating to employee salary progressions and benefits (including salary insurance data) are normally kept in employee files; these are covered under a separate schedule (see schedules 02.08 to 02.11).				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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02 - HUMAN RESOURCES / WORKING CONDITIONS AND BENEFITS				
02.23		Life insurance – Employees		
Records relating to employee’s designation of beneficiaries and to claims and payments of life insurance benefits.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	D
Notes : (D = Destruction R = Retention)				
1 Retention 1 year following employee’s departure or 1 year following full settlement to beneficiaries in the event of employee’s death.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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02 - HUMAN RESOURCES / WORKING CONDITIONS AND BENEFITS

02.24

Accident, illness, drug insurance – Employees

Records relating to employee enrolment, enrolment of eligible children, claims for reimbursement for medical expenses and all claims for accident, illness or drug insurance benefits.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	4 years	D

Notes : (D = Destruction R = Retention)

¹ Retention 2 years following closing of file. Retain records relating to minor and routine claims for 2 years, then destroy.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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02 - HUMAN RESOURCES / WORKING CONDITIONS AND BENEFITS

02.25

Retired employees – Electronic records

Data on retired employees.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹		D ²

Notes : (D = Destruction R = Retention)

¹ Retain until 100th anniversary of birth date of retired employee or until employee's death.

² Destruction: Research value ensured by retaining the following records on paper: reports produced for agencies responsible for administering pension plans (schedule [02.26](#)).

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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02 - HUMAN RESOURCES / WORKING CONDITONS AND BENEFITS				
02.26	Pension plans			
Records relating to the administration of employee pension plans: lists of participants, correspondence and reports produced for agencies responsible for administration of pension plans, annual reports, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	4 years	R ²
Secondary [a]	other units concerned	1 year		D
Notes : (D = Destruction R = Retention)				
¹ Retention 2 years (until settlement or judgement in cases of grievance or legal procedures) or until replacement of records by a new version. ² Archives selection: Retain reports produced for agencies responsible for administration of retirement pension plans and pension plan annual reports. Destruction of support documents.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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02 - HUMAN RESOURCES / WORKING CONDITIONS AND BENEFITS				
02.27	Pension plans – Employees			
Employee pension plan records relating to: enrolment, participation records for unpaid leave or following retirement, pension estimates, status of contributions and interest, correspondence transfers, contributions, entitlement statements following legal separation, divorce or annulment of marriage (division of family patrimony), dependent minor children certificates, requests for corrections, declarations of common-law spouse, buy-back requests, employment termination notices, applications for pension benefits, severance pay, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	D
secondary [a]	other units concerned	1 year		D
Notes : (D = Destruction R = Retention)				
¹ Retention 1 year following transfer of pension funds to another institution or after full settlement to beneficiary and his/her successors. Contribution statements destroyed on receipt of a new version. ² In the case of departure or transfer, retain until the 100th anniversary of employee's birth. Retain statements of contributions and interest until replacement by a new version.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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02 - HUMAN RESOURCES / OCCUPATIONAL HEALTH AND SAFETY				
02.28	Occupational health and safety			
Records relating to occupational health and safety, prevention programs, workplace inspections, ergonomics, workplace quality of life, accidents in the workplace, inspection reports, application of labour standards, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	1 year		D
Notes : (D = Destruction R = Retention)				
¹ Archives selection: Retain reports documenting health and safety measures and programs adopted by the institution.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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02 - HUMAN RESOURCES / OCCUPATIONAL HEALTH AND SAFETY				
02.29	Occupational accident records			
Records relating to employees' accidents at work: case summaries, progress notes, employer's notifications to the Commission de la santé et de la sécurité du travail du Québec, temporary assignment notices, claims, reimbursement applications, medical certificates and reports, work fitness certificates, correspondence and various forms issued by the CSST.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	D
secondary [a]	other units concerned	X ³		D
Notes : (D = Destruction R = Retention)				
¹ Retention 1 year following full settlement of case. ² Retention until 100th anniversary of employee's birth. ³ Retention 1 year following employee's departure.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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02 - HUMAN RESOURCES / OCCUPATIONAL HEALTH AND SAFETY				
02.30	Employee medical records			
Records relating to employee health (workplace accidents are covered in a separate schedule): general information, case histories, evaluations, diagnoses, examination results, specialist reports, care prescribed, progress reports, records relating to preventive withdrawal or temporary postings for reasons of pregnancy or maternity, correspondence with the Commission de la santé et de la sécurité au travail du Québec, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	x ¹	x ²	D
secondary [a]	other units concerned	x ³		D
Notes : (D = Destruction R = Retention)				
1 Retention until employee's departure.				
2 Retention 10 years following last file entry.				
3 Retention 1 year following employee's departure.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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02 - HUMAN RESOURCES / EMPLOYEE EVALUATION, DEVELOPMENT AND MOVEMENT				
02.31	Personnel evaluations			
Records relating to personnel performance evaluations: programs and evaluation guides, lists of employees to be evaluated, evaluation and employee performance criteria, disciplinary measures application policies. This schedule does not cover records connected with evaluations limited to a single employee of the institution (these records are normally filed in the employee's file and are covered under separate retention schedules: see schedules 02.08 to 02.11).				
Copy	Unit	Active	Semi-active	Inactive
principal [a]	unit responsible	X ¹	X ²	R ³
secondary [a]	Other units concerned	X ¹		D
Notes : (D = Destruction R = Retention)				
¹ Retention as long as program or records are in effect.				
² Retention 5 years or as long as records are necessary for application of collective agreements (periodic evaluation, evolution of criteria, etc.).				
³ Archives selection: Retain evaluation programs and guides. Destruction of support documents (lists of employees to be evaluated, etc.)				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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02 - HUMAN RESOURCES / EMPLOYEE EVALUATION, DEVELOPMENT AND MOVEMENT

02.32

Professional development

Records relating to the administration of group or individual professional development activities for personnel: development programs (courses, workshops, practicums, exchange programs, etc.), applications for training, application evaluation criteria, budgets, invitations to submit projects, documentation, publicity and announcements, registration lists, activity reports, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retain as long as records are in effect (programs evaluation criteria, etc.) or 2years after conducting development activity.

² Archives selection: Retain programs, activity reports and the institution's human resources development plans. Destruction of support documents (budgets, publicity, documentation, etc.).

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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02 - HUMAN RESOURCES / EMPLOYEE EVALUATION, DEVELOPMENT AND MOVEMENT

02.33

Professional development – Employees

Records documenting the completion of various employee professional development activities: applications to participate in specific professional development activities (courses, workshops, leaves, sabbaticals, etc.), requests for exemption or reimbursement of tuition fees, grant applications, requests for professional development leave, activity reports, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	2 years	D ²
secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

¹ Retain until closing of file (receipt of activity report and reimbursement of expenses, updating of cumulative record of employee's professional development activities).

² Destruction authorized where research integrity is ensured by retention of cumulative records of employee's professional development activities (normally filed in employee files, which are covered under separate retention schedules; see schedules 02.08 to 02.11). If there is no cumulative record, retain a listing of completed professional development activities in employee's file.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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02 - HUMAN RESOURCES / EMPLOYEE EVALUATION, DEVELOPMENT AND MOVEMENT				
02.34	Staff social functions			
Records relating to various staff social activities: celebrations, sports and athletic events, choirs, social clubs, charitable activities, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	3 years		D
secondary [a]	other units concerned	X ¹		D
Notes : (D = Destruction R = Retention)				
¹ Retention until date of activity.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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02 - HUMAN RESOURCES / EMPLOYEE EVALUATION, DEVELOPMENT AND MOVEMENT				
<u>02.35</u>	Employee assistance programs			
Records documenting assistance, evaluation and reference services to specific persons or the organization of information, awareness and prevention activities offered to staff: workshops, lectures, joint committees, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	1 year		D
Notes : (D = Destruction R = Retention)				
¹ Retain working files on organization of activities for 2years after conducting activity. Files documenting personal interventions (involving employees) are confidential and are normally kept under the supervision of the officer responsible for the EAP, who should dispose of them according to the operative code of ethics.				
² Archives selection: Retain annual statements of activities and destroy working or support files.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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02 – HUMAN RESOURCES / EMPLOYEE EVALUATION, DEVELOPMENT AND MOVEMENT

02.36

Staff movement

Records relating to employee promotions, changes, reclassifications, demotions, transfers, temporary assignments, rebates, lay-offs, terminations, firings, retirements (lists, assignment application forms, etc.).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	1 year	5 years	R ¹
secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: retain professor promotion files (if these records are not filed in employee files.) Destruction of working records (forms, lists) and files relating to other categories of employee (records of employee movements are normally included in employee files and are covered under separate retention schedules; see schedules 02.08 to 02.11).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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02 – HUMAN RESOURCES / LABOUR RELATIONS

02.37

Unions and employee associations

Records relating to employee unions, associations and groups: accreditations, dues, membership applications, identification of union delegates, requests for leave for union business, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	4 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retain 1 year (requests for leave for union business), as long as records are in effect (accreditations, association recognition) or until updated.

² Archives selection: Retain union accreditations or records documenting decisions relating to the recognition of employee associations or groups. Destruction of support documents (delegate lists, union business leaves, etc.).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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02 – HUMAN RESOURCES / LABOUR RELATIONS

02.38

Employment contracts or agreements

Records relating to the negotiation, approval and application of collective agreements between the institution and the various unions or associations representing its employees: bargaining files (correspondence, offers and demands of parties involved, strategy records, proceedings of bargaining sessions, press files), contracts, collective agreements or understandings (letters of understanding attached), cost projections, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	R ³
secondary [a]	other units concerned	X ⁴		D

Notes : (D = Destruction R = Retention)

¹ Retain as long as records are in effect.

² Retention 10 years or for the duration of the next two collective agreements.

³ Archives selection: Retain the first management and union offers, the objectives and mandates of both parties, final versions of work contracts, letters of understanding, press files and documents relating to the interpretation of collective agreements. Destruction of bargaining process support documents.

⁴ Retention until contract is signed.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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02 – HUMAN RESOURCES / LABOUR RELATIONS

02.39

Labour relations

Records relating to grievances (grievance forms, correspondence, settlements, reports of hearings, letters of understanding), arbitrations, adjudications, labour disputes (records of job actions/pressure tactics, strikes, lock-outs, work stoppages, study days, essential services, disciplinary measures, etc.).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	R ³
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retain until final resolution (settlement of grievance, end of labour dispute or disciplinary measures).

² Retention 10 years. Where applicable, records relating to disciplinary measures should be destroyed immediately after the expiry of the retention period set out in the collective agreement concerned.

³ Archives selection: Retain adjudication decisions, significant documents on major labour disputes (injunctions, legal action or procedures, legal decisions, press files, etc.) and definitions of essential services. Destroy grievances and disciplinary measures.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

PREVIOUS SCHEDULE | NEXT SCHEDULE (To [03 - Financial Resources](#))

End of Category: 02 - Human Resources



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03 – FINANCIAL RESOURCES

03 - FINANCIAL RESOURCES / FUNDING				
<u>03.01</u>	Budget rules and operating grant calculations			
Records relating to the calculation of operating grants accorded by the Ministry of Education: budgeting rules, grant allocation models, performance contracts, working records, details of grants received, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	5 years	R
secondary [a]	other units concerned	1 year		D
Notes : (D = Destruction R = Retention)				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
PREVIOUS SCHEDULE To Section 02- Human Resources NEXT SCHEDULE				
				Updated: 14/3/02



03 - FINANCIAL RESOURCES / FUNDING	
03.02	Fundraising campaigns – Electronic records
Data used in managing fundraising campaigns: donors, fundraisers, donations, pledges, accounting transactions, etc.	

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹	5 years	D ²
Notes : (D = Destruction R = Retention) 1. Retention: 2 years following the last donation entry or as long as data may be used in subsequent fundraising campaigns (for example, according to intervals between class anniversaries/reunions). 2. Destruction: Research value ensured by retention of the following records on paper: records documenting the organization and operation of fundraising campaigns, reports showing results obtained and donor lists (see schedule 03.03).				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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03 - FINANCIAL RESOURCES / FUNDING				
03.03	Fundraising campaigns			
Records relating to the organization and operation of fundraising campaigns: recruitment of fundraisers, donor lists, financial reports, accounting records relating to donations (lists of charitable receipts, lists of direct debits, lists of deductions at source, etc.).				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ³		D
Notes : (D = Destruction R = Retention)				
1 Retention: 2 years following the last donation entered or as long as the records may be used in future fundraising campaigns (for example, according to intervals between class anniversaries/reunions).				
2 Archives selection: Retention of summary records documenting the organization and operation of fundraising campaigns, reports showing results obtained and donor lists. Destruction of support documents: recruitment of fundraisers, lists of accounting reports, etc.				
3 Retention: Until the end of the fundraising campaign.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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03 – FINANCIAL RESOURCES / FUNDING	
03.04	Foundations, endowments

Records relating to the ongoing management of the various endowment and subscription funds administered by the institution: correspondence, financial records, etc. concerning the constitution, investment and use of sums of money given to the institution by individuals or organizations for general or specific purposes (chairs, special funds, etc.).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ³		D

Notes :
(D = Destruction R = Retention)

¹ Retention: 2 years following end of use of funds concerned.
² Archives selection: Retention of general information on the financial nature and development of each fund (creation, objectives, summary records, financial tables showing the financial development and portfolio composition of each fund). Destruction of support records.
³ Retention: Until end of use of funds concerned.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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03 – FINANCIAL RESOURCES / BUDGETS

03.05

Budgets – Electronic records

Data used to prepare and follow up on budgets of the institution and its various components (operating funds, investment funds, research funds, special funds, trust funds): budget estimates, annual budgets (statements of revenue and expenditure), accounting management of budgetary activities, financial reports, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	2 years	5 years	D ¹

Notes :

(D = Destruction R = Retention)

¹ Destruction: Research value ensured by retention of the following paper records or microfilm: official versions of budgets approved, global statements of expenditures at fiscal-year-end and detailed budget accounting statements (see schedule 03.06).

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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Updated: 14/3/02



03 – FINANCIAL RESOURCES / BUDGETS

03.06

Budgets

Records relating to the planning, control and follow-up of the budgets of the institution and its various components (operating funds, investment funds, research funds, special funds, trust funds), to the management of budget frameworks, budget rules, budget estimates and submissions, to recurrent budget plans, approved budgets and plans for consolidating or balancing budgets, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years (given the volume of records, production of budget reports on microfilm is recommended).

² Archives selection: Retain budget plans, five-year investment plans, official versions of approved budgets, global statements of expenditures at fiscal year-end and detailed budget statements (if there are cumulative reports, only the last statement of the fiscal year should be retained).

Destruction of budget preparation and follow-up support documents: Development documents, estimates, budget calculations, submissions and modifications, summary budget reports, periodic budget reports and accounting statements (statements, summary statements of revenue and expenditure, statements of surpluses and deficits, deviation analyses, summaries of transfers and additional budgets, reports on capital expenditures), etc.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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03 - FINANCIAL RESOURCES / ACCOUNTING

03.07

Accounting – Electronic records

Data used in managing accounting system budget activities: outstanding obligations, yearly transactions, cash or treasury journals (cash receipts and disbursements), general ledgers, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹	5 years	D ²

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years (data relating to outstanding obligations can be destroyed as soon as obligations have been reported or debited).

² Destruction: Research value ensured by retention of the following records on paper or microfilm: general ledgers or equivalent, accounting systems, cash or treasury journals (cash receipts and disbursements) and journal entries (general ledger) (see schedule [03.08](#)).

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other



03 – FINANCIAL RESOURCES / ACCOUNTING

03.08

Accounting

Records relating to the management of the accounting system: accounting charts, general ledgers, cash or treasury journals (receipts and disbursements), general journals, purchase journals, supporting documents, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retain accounting system general ledgers or equivalent, cash or treasury journals (receipts and disbursements) and journal entries (general journal) unless the equivalent information is available in general ledgers. Destruction of supporting documents and all other support documents used in the management of the accounting system.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other



03 - FINANCIAL RESOURCES / ACCOUNTING

03.09

Accounts receivable – Electronic records

Data used in the management of accounts receivable: internal invoicing, external invoicing, management of client accounts, clientele payment monitoring, retail sales controls, etc. Student accounts data are covered under a separate retention schedule (see schedule [03.11](#)).

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹	5 years	D ²

Notes :		(D = Destruction R = Retention)
¹ Retention: 2 years after the final payment of an account or closing of collection file. ² Destruction: Research value ensured by retention of the following records on paper or microfilm: general ledgers or equivalent, cash or treasury journals (receipts and expenditures) and journal entries (general ledger) (schedule 03.08).		
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other		
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03 – FINANCIAL RESOURCES / ACCOUNTING				
03.10	Accounts receivable			
Records relating to the management of accounts receivable and revenue controls (general revenues, investments, sponsorships, sales of services etc.). Records relating to student accounts are covered under a separate retention schedule (see schedule 03.12).				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	D
secondary [a]	other units concerned	2 years		D
Notes : (D = Destruction R = Retention)				
¹ Retention: 2 years after payment of account or closing of collection file.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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03 – FINANCIAL RESOURCES / ACCOUNTING	
03.11	Student accounts – Electronic records

Data used in the invoicing, collection and management (including issuance of receipts for tax purposes) of tuition fees and other fees payable by the institution's students.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹	5 years	D ²

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years after final payment of account or closing of collection files or as long as the student is liable.

² Destruction: Research value ensured by retention of the following records on paper or microfilm: general ledgers or equivalent, cash or treasury journals (receipts and disbursements) and journal entries (general ledgers) (schedule 03.08).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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03 – FINANCIAL RESOURCES / ACCOUNTING

03.12

Student accounts

Records relating to the control of invoicing, collection and management of tuition fees and other fees payable by the institution's students: student accounts statements, records dealing with invoicing, payments and recoveries of tuition fees, issue of tuition receipts for tax purposes, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	D
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years after payment of account or closing of collection file.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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03 - FINANCIAL RESOURCES / ACCOUNTING

03.13

Grants

Records relating to the financial management of the various grants received: applications to open a research budget account, financial reports, correspondence, budget amendments, grant cheque stubs and all supporting documents required for the control of research grant budgets (research budget account openings, decreases, increases or modifications). Records relating to grant applications (subjects, objectives, timetables, etc.), to the use of amounts allocated and to the results of research projects so funded are covered in a separate retention schedule (see schedule 08.07).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	D
secondary [a]	other units concerned	X ²		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after end of research project and closing of file.

² Retention: 2 years after end of research project (copies of support documents are destroyed after 2 years).

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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03 – FINANCIAL RESOURCES / ACCOUNTING

03.14

Accounts payable – Electronic records

Data used in following up on requests for payment from the receipt of invoices to their payment by the supplier's deadline. Such files also allow the preservation of paid or cancelled cheque materials, the issuing of cheques to various suppliers in payment of invoices received, the issuing of student bursary cheques, the preservation of files on suppliers who have issued invoices to accounts payable, the consolidation of purchase orders and invoices, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹	5 years	D ²

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years following final account payment.

² Destruction: Research value ensured by retention of the following records on paper or microfilm: general ledgers or equivalent, cash or treasury journals (receipts and disbursements) and general ledger entries (schedule 03.08).

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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03 - FINANCIAL RESOURCES / ACCOUNTING

03.15

Accounts payable

Records relating to the management of accounts payable: invoices, requests for payment, supporting documents, suppliers' account files, cheques (cashed, cancelled, returned, NSF, cheque copies), logs and lists of cheques issued, records relating to the administration of petty cash, reimbursements of expenses incurred for travel, representation, moving, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	X ¹	D
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Retention: 5 years or the duration of warranty, whichever is longer (warranties may also be kept in the movable assets file, covered under schedule 04.10).

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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03 – FINANCIAL RESOURCES / SALARY MANAGEMENT

03.16

Salary management – Electronic records

Data used in the cyclical process of remunerating the institution's employees: payment of salaries, production of remittance reports, employment statements, financial forms, pension fund reports, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	2 years	X ¹	D ²

Notes :		(D = Destruction R = Retention)
¹ Retention: Until the 100th anniversary of the employee's birth (for purposes of reconstituting pension plans or for any other operations involving retroactive treatment of previous data). Data used to produce global administrative reports (total expenditures on pay for a given period, cumulative liabilities, etc.) and data relating to payment of honoraria (not involving pension plan contributions) can be destroyed after 5 years. ² Destruction: Research value ensured by retention of the following records on paper: salary scales and records relating to staff pay bases (schedule 02.16).		
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other		
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03 - FINANCIAL RESOURCES / SALARY MANAGEMENT				
03.17	Salary management			
Records relating to the administration of employees’ pay: financial forms (T4, TP4), periodic reports on hours worked and salaries paid, pay journals or logs, accumulated sick leave statements, time sheets, records relating to salary deductions, authorization of deductions at source, issue of employment statements, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	x ¹	D
secondary [a]	other units concerned	2 years		D
Notes : (D = Destruction R = Retention)				
¹ Retention: 5 years or as long as records are in effect or have an effect on an employee’s pay: deduction at source authorizations, records relating to alimentary pensions, benefits, specific exemptions, etc. Retention: 75 years for records that can be used to establish an employee salary history (for purposes of reconstructing pension plans or any other operation involving retroactive analysis of past data: lists of salary deductions, lists of tax deductions, pension fund deductions, pay journals or logs, cumulative salary and liability statements, statements of earnings-per-period (cumulative), etc. (Records containing information that is available in a more comprehensive report, for example tax slips, can be destroyed after 5 years).				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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03 – FINANCIAL RESOURCES / BANKING, LOANS, INVESTMENTS AND GUARANTEES	
<u>03.18</u>	Banking

Records relating to the management of the institution's banking: account statements, bank reconciliations, deposit slips, liquidity status, cheques paid, bank service contracts, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	5 years	D
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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03 – FINANCIAL RESOURCES / BANKING, LOANS, INVESTMENTS AND GUARANTEES

03.19

Loans, investments and guarantees

Records relating to the management of loans, investments and guarantees, including lines of credit, term loan contracts, mortgages, forward exchange contracts, swap contracts, issues of bonds or debentures, share certificates, term deposits, investment or deposit certificates.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	D
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years following expiry of loan or investment certified by the record.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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03 – FINANCIAL RESOURCES / FINANCIAL STATEMENTS

03.20

Reports and financial statements

Records relating to the control and auditing of the institution's financial management: reports and financial statements, programs, auditing mandates and reports (internal and external), etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	8 years	R ¹
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retain annual financial statements, reports of the external auditor, annual cumulative financial reports, annual financial forms (submitted by the institution to the Quebec government), internal auditing programs and reports. Destruction of support documents used in the production of reports and financial statements and in auditing operations.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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03 - FINANCIAL RESOURCES / TAXES

03.21

Taxes

Records relating to taxes levied by various levels of government: tax statements, declarations or recoveries of sales tax and GST payments, excise tax remittances, records dealing with the issue of charitable receipts (including registration numbers), etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	5 years	D
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

End of Category: 03 - Financial Resources



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04 – REAL AND MOVABLE PROPERTY

04 - REAL AND MOVABLE PROPERTY / REAL PROPERTY

[04.01](#)

Property management – Electronic records

Data used in the inventory control and management of buildings, land and premises owned or rented by the institution (administrative space, premises, grounds, parking lots, sports facilities, etc.).

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹		D ²

Notes : (D = Destruction R = Retention)

¹ Retention: as long as the institution is owner or tenant of the building or property.

² Destruction: Research value ensured by retention of paper versions of annual profiles of the institution's real property assets (see schedule [04.02](#)).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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04 - REAL AND MOVABLE PROPERTY / REAL PROPERTY

[04.02](#)

Property management

Records relating to the description, inventory and evaluation of the institution's buildings, premises and land: plans, specifications and inventories of real property assets, physical descriptions, protection of cultural properties, municipal assessments, lists of sports facilities and other physical resources.

Copy	Unit	Active	Semi-active	Inactive
------	------	--------	-------------	----------

primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	2 years		D
Notes : (D = Destruction R = Retention)				
¹ Archives selection: Retention of inventories providing annual profiles of the institution's real property (buildings, land, premises, etc.). Retention of official records dealing with the protection of cultural real property held by the institution.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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04 - REAL AND MOVABLE PROPERTY / REAL PROPERTY				
<u>04.03</u>	Facilities management and development - Electronic records			
Data used in overseeing the institution’s building construction projects or refitting of its spaces: drawings and specifications, architectural designs, renovations, redevelopments and relocations, building management contracts, signage control, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹		D ²
Notes : (D = Destruction R = Retention)				
¹ Retention: As long as data are used in the management and oversight of these activities (construction, renovation, redevelopment, relocation).				
² Destruction: Research value ensured by the retention of paper records substantively documenting the institution’s major construction and redevelopment projects (see schedule 04.04).				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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04 - REAL AND MOVABLE PROPERTY / REAL PROPERTY	
04.04	Facilities management and development
Records relating to the institution's building construction projects, refits, relocation activities and signage: construction permits, specifications, tenders, plans and drawings, contracts and related records, surveyors' and architects' certificates, leases, correspondence, minutes of job meetings, relocation and signage management files, etc.	

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	X ²	R ³
secondary [a]	other units concerned	X ¹		D
Notes : (D = Destruction R = Retention) ¹ Retention: Until end of project (rejected tenders should be destroyed after 3 years). ² Retention: 10 years from the date the institution ceases to own the building (records dealing with minor refits, relocations and signage should be destroyed after 10 years). ³ Archives selection: Retention of records that substantively document major construction and renovation work on the institution's real property assets (tenders accepted, specifications, plans and drawings, contracts and related records, surveyors' and architects' certificates, etc.). [] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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04 – REAL AND MOVABLE PROPERTY / REAL PROPERTY				
04.05	Space allocation – Electronic records			
Data relating to space management the use, assignment, distribution, rentals and reservations of the institution’s buildings, land and premises.				



04 - REAL AND MOVABLE PROPERTY / REAL PROPERTY	
04.06	Space allocation

Records relating to the use, assignment, distribution, rentals and reservations of the institution's buildings, land and premises for the purposes of teaching, research, innovation, social and cultural activities, meetings, colloquiums, conferences, etc.: lists of premises, lists of courses or events by location, reservation forms, user identifications, allocation requests, occupancy schedules, rental contracts for classrooms, auditoriums and theatres, laboratories, sports facilities, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	5 years	D
secondary [a]	other units concerned	2 years		D
Notes : (D = Destruction R = Retention)				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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04 - REAL AND MOVABLE PROPERTY / REAL PROPERTY

<u>04.07</u>	Parking – Electronic records			
Data used to manage the use of parking lots administered by the institution: entrance registrations, allocation of parking stickers, statistics, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	2 years		D
Notes : (D = Destruction R = Retention)				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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04 - REAL AND MOVABLE PROPERTY / REAL PROPERTY

04.08

Parking

Records relating to the management of the institution's parking lots (operation, management, maintenance, repair): parking permits, receipts for parking stickers, parking slips (showing hour of vehicle entrance and departure), daily parking reports, client lists, requisitions and invoices for towing illegally-parked vehicles, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	5 years	D

Notes : (D = Destruction R = Retention)

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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04 - REAL AND MOVABLE PROPERTY / MOVABLE PROPERTY

04.09

Movable property management – Electronic records

Data used to monitor the inventory and management of the institution's movable property: supply and equipment inventory controls, purchasing, ordering, deliveries, supplier relations, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹	5 years	D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after end of transaction or as long as data are in effect (orders filled, end of transactions with suppliers, expiry of warranties, updating of movable asset inventories, etc.).

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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04 - REAL AND MOVABLE PROPERTY / MOVABLE PROPERTY

04.10

Movable property management

Records relating to the management of the institution's movable property (supplies and equipment): asset inventories, proofs of purchase, needs analyses, purchase or service requisitions and approvals (locksmiths, printers, shops, etc.), orders, tenders accepted, invoices, delivery orders, delivery location lists, acknowledgements of receipt of goods, supplier files, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	D
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years after conclusion of transaction or as long as records are in effect (orders filled, end of transactions with suppliers, expiry of warranties, updating of movable asset inventories, etc.).

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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04 - REAL AND MOVABLE PROPERTY / MOVABLE PROPERTY

04.11

Movable property allocation – Electronic records

Data used in monitoring the use and disposition of the institution's movable property (loans, rentals and sales of supplies and equipment).

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹	5 years	D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years following conclusion of transaction (date of sale, end of rental or return of borrowed equipment).

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

PREVIOUS SCHEDULE | NEXT SCHEDULE



04 - REAL AND MOVABLE PROPERTY / MOVABLE PROPERTY

04.12

Movable property allocation

Records relating to the monitoring of the use and disposition of the institution's movable property (loans, rentals and sales of supplies and equipment).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	D
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years following conclusion of transaction (date of sale, end of rental or return of borrowed equipment)

[] = medium ---> a = paper b = microfilm c = electronic _ d = audio-visual e = other

PREVIOUS SCHEDULE | NEXT SCHEDULE



04 - REAL AND MOVABLE PROPERTY / MOVABLE PROPERTY

04.13

Vehicles

Records relating to the purchase, inventory, maintenance, repair, licensing, alteration and replacement of the institution's vehicles (automobiles, trucks, etc.).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	D

Notes :		(D = Destruction R = Retention)
¹ Retention: 1 year from the date the vehicle is deemed to be no longer in use or the property of the institution. Records relating to vehicle use (fuel consumption, travel or routing orders, mileage, reservations, operating logs, etc.) should be destroyed after 1 year.		
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other		
PREVIOUS SCHEDULE NEXT SCHEDULE		
		Updated: 14/3/02



04 – REAL AND MOVABLE PROPERTY / MAINTENANCE AND REPAIR OF REAL AND MOVABLE PROPERTY				
<u>04.14</u>	Maintenance and repair of real and movable property – Electronic records			
Data used in monitoring the maintenance and repair operations of the institution’s buildings, premises, grounds, equipment and physical plant: building and equipment upkeep and maintenance schedules, parts and equipment catalogues, work logs, parts and labour invoices, preventive maintenance, fuel consumption, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹	5 years	D
Notes :		(D = Destruction R = Retention)		
¹ Retention: 2 years or as long as data are used to monitor maintenance and repair work.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
PREVIOUS SCHEDULE NEXT SCHEDULE				
Updated: 14/3/02				



04 – REAL AND MOVABLE PROPERTY / MAINTENANCE AND REPAIR OF REAL AND MOVABLE PROPERTY				
04.15	Maintenance and repair of real and movable property			
Records relating to the maintenance and repair of the institution’s physical plant, equipment, and real property (general upkeep of buildings, premises, grounds and heating systems, janitorial services, plumbing, electrical, air conditioning, etc.): internal maintenance and repair requisitions and request forms, cost estimates, work descriptions, investigations, work orders, inspection reports, maintenance programs, supplier files for maintenance, repair, installation services, etc.				
Copy	Unit	Active	Semi-active	Inactive

primary [a]	unit responsible	X ¹	X ²	D
secondary [a]	other units concerned	2 years		D
Notes : (D = Destruction R = Retention) ¹ Retention: Until completion of maintenance and repair work (rejected tenders, requisitions, and other support records should be destroyed after 3 years). ² Retention: 10 years from the date the institution ceases to be the owner of the building or as long as the institution is renting the building (records dealing with minor maintenance and repair work should be destroyed after 10 years).				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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Updated: 14/3/02				



04 – REAL AND MOVABLE PROPERTY / MAINTENANCE AND REPAIR OF REAL AND MOVABLE PROPERTY				
04.16	Water, electricity, heat			
Records relating to the monitoring of water quality and consumption and supply of energy resources necessary for the operation of the institution's mechanical and technical systems (electricity, natural gas, gasoline, etc.): reports of power disruptions, requests to shut off power, reports of power outages, water flow and quality analyses, periodic generator unit tests, meter readings of electricity, oil, natural gas, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	3 years		D
secondary [a]	other units concerned	1 year		D
Notes : (D = Destruction R = Retention)				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
PREVIOUS SCHEDULE NEXT SCHEDULE				
Updated: 14/3/02				



04 - REAL AND MOVABLE PROPERTY / SECURITY	
04.17	Security – Electronic records

Data used in managing prevention and security activities in the institution's buildings, premises and grounds (protection of people and real and movable property): emergency planning, prevention activities, supervision of security staff, access to buildings and premises, locks, protection of equipment, found objects, hazardous products, security equipment inventories, first aid programs, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹		D ²

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years or as long as data are in effect..

² Destruction: Research value ensured by retention of emergency measures plans on paper (schedule 04.18).

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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04 - REAL AND MOVABLE PROPERTY / SECURITY

04.18

Prevention activities and security measures

Records relating to the planning and organization of the institution's prevention activities and security measures (protection of people and real and movable property): security services programs and reports, emergency measures, evacuation plans and exercises, organization and training of first aid teams, management of lost and found objects, security systems (fire protection, alarm systems, electronic surveillance) etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years or as long as records, programs or plans are in effect.

² Archives selection: Retention of emergency measures plans. Destruction of support records.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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04 - REAL AND MOVABLE PROPERTY / SECURITY

04.19

Security activities

Records relating to actions taken as a result of infractions, crimes, thefts, acts of vandalism, accidents, hazardous product spills, bomb alerts, alarm system triggerings (intrusion, fire) and other security problems arising in the institution's buildings, premises and grounds: reports, inquiry files, complaint and alarm logs, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	8 years	D
secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years following the intervention or closing of file.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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04 – REAL AND MOVABLE PROPERTY / SECURITY

04.20

Access to buildings and premises

Records relating to the control of access to the institution's buildings, premises and grounds: building passes, visitor registration logs, key orders, key control registers and tags, authorizations to open locks or cut padlocks, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		D
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: 3 years or as long as records are in effect (key distribution controls).

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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04 - REAL AND MOVABLE PROPERTY / SECURITY

04.21

Hazardous products

Records relating to the analysis, use, transport, storage and disposition of hazardous materials used on premises: radioactive matter (radio-isotopes), chemical substances, toxic wastes, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	8 years	D ²
secondary [a]	other units concerned	X ¹		D

Notes :

(D = Destruction R = Retention)

¹ Retention: 2years or until closing of file.

² Destruction (Destruction of records dealing with the acquisition and use of radioactive matter may require a preliminary clearance from atomic energy control authorities.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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04 – REAL AND MOVABLE PROPERTY / SECURITY

04.22

Security equipment

Records relating to the management of supplies and materials used in the institution's prevention and security activities: equipment inventories, apparatus inspection reports, fire extinguisher verification tags, equipment loans, distribution of first aid kits, etc.

copy	Unit	Active	Semi-active	Inactive
------	------	--------	-------------	----------

primary [a]	unit responsible	X ¹		D
secondary [a]	other units concerned	X ¹		D
Notes : (D=Destruction R=Retention)				
¹ Retention: 3 years or as long as records are in effect.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
PREVIOUS SCHEDULE NEXT SCHEDULE (To 05 – Student Affairs)				
				Updated: 14/3/02
End of Category: 04 – Real and movable property				



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Records Retention Schedules for
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05 – STUDENT AFFAIRS

05 - STUDENT AFFAIRS / STUDENT POPULATION				
05.01	Forecasting Student Population			
Records relating to the forecasting, study and analysis of the evolution of the institution’s student population: projections, studies, reports, statistics, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R
secondary [a]	other units concerned	2 years		D
Notes : (D = Destruction R = Retention)				
[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other				
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05 - STUDENT AFFAIRS / STUDENT POPULATION				
05.02	Student recruitment			
Records relating to promotional activities organized for the purpose of recruiting new students: open houses, college tours, participation in information fairs and functions, etc. Records relating to publicity or advertising in the media or posted in public places are covered under a separate retention schedule (see schedule 09.06).				
copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)	
¹ Archives selection: Retention of reports describing activities organized and results obtained.	
[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other	
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05 – STUDENT AFFAIRS / STUDENT POPULATION				
05.03	Student population – Electronic records			
Data used to develop a profile of the institution’s student population in a given period: census data on the university population, data used to prepare preliminary and official statistics on registrations by program, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	2 years	5 years	R
Notes : (D = Destruction R = Retention)				
[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other				
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05 – STUDENT AFFAIRS / STUDENT POPULATION				
05.04	Student population			
Records dealing with the monitoring of the evolution of the institution’s student population: preliminary and official statements of registrations, admissions and activities, preliminary and official statistics, listings of full-time students, reports on the student population, university clientele inventories, analyses of student strength, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	2 years		D
Notes : (D = Destruction R = Retention)				
¹ Archives selection: Retention of official statistics, studies and reports. Destruction of preliminary records, lists and reports.				
[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other				



05 - STUDENT AFFAIRS / ADMISSIONS, REGISTRATIONS, EVALUATIONS

05.05**Organization of academic session (student population) -
Electronic records**

Data used to monitor the management of the student population in a given academic session: issue of registration statements (invoices), issue of transcripts, lists of inactive files, registrations, potential graduates, rejected applicants, progressive penalties, students in financial arrears, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	2 years	5 years	D ¹

Notes : (D = Destruction R = Retention)

¹ Destruction: Research value ensured by retention of electronic records on the student population (schedule [05.03](#)) and the following paper records: statistics, official studies and reports relating to the student population (schedule [05.04](#)).

[] = medium ---> a = paper b = microfilm c =electronic d = audio-visual e = other



05 - STUDENT AFFAIRS / ADMISSIONS, REGISTRATIONS, EVALUATIONS

05.06**Organization of academic session (student population)**

Records relating to the monitoring of transactions associated with the management of the student population in a given academic session: reports of issue of registration statements (invoices), lists of issues of transcripts, lists of inactive files, potential graduates, rejected applicants, progressive penalties, students in arrears, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	5 years	D
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

[] = medium ---> a = paper b = microfilm c =electronic d = audio-visual e = other



05 - STUDENT AFFAIRS / ADMISSIONS, REGISTRATIONS, EVALUATIONS				
05.07	Admissions management - Electronic records			
Data used in recording and monitoring transactions associated with the institution’s student admissions process: student identifications, lists of applications for admission, entry of required documentation, decisions, replies, dates, admission tests (French test, tests required for certain programs), etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹		D ²
Notes : (D = Destruction R = Retention)				
¹ Retention: 3 years following student’s last registration (for students admitted but who did not register, retain 1 year following academic session applied for).				
² Destruction: Research value ensured by retention of the institution’s official admissions policies and statistics on paper (see schedule 05.08).				
[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other				
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Updated: 14/3/02				



05 - STUDENT AFFAIRS / ADMISSIONS, REGISTRATIONS, EVALUATIONS				
05.08		Admissions management		
Records relating to the establishment and general administration of student admissions policies and procedures: admissions policies (general and specific conditions of admission, quotas, capacity, etc.), information disseminated to colleges, admissions assistance, lists of applicants for admission, selection tests (questionnaires, interview grids, critical evaluations, French tests), statistical admissions reports and surveys, right to appeal follow-up mechanisms, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	2 years		D
Notes : (D = Destruction R = Retention)				
¹ Archives selection: Retention of the institution's official admissions policies and statistics, as well as samples of selection test questionnaires. Destruction of preliminary lists and records, lists of applicants for admission, records exchanged between the institution and colleges, and finalized selection tests.				
[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other				
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05 - STUDENT AFFAIRS / ADMISSIONS, REGISTRATIONS, EVALUATIONS	
05.09	Registration management - Electronic records

Data used in recording and managing the institution's student registration process: information on students registered per academic session, enrolment by program, interuniversity agreements, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹		D ²

Notes: (D = Destruction R = Retention)

¹ Retention: 3 years following student's last registration. Files opened only for purposes of managing registration in a given academic session (for example, files of students who are not registered but whose files remain open) may be destroyed after the end of the academic session concerned.

² Destruction: Research value ensured by retention of the following paper records: official statistics, studies and reports on the student population (see schedule [05.04](#)).

[] = medium ---> a = paper b = microfilm c =electronic d = audio-visual e = other

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05 - STUDENT AFFAIRS / ADMISSIONS, REGISTRATIONS, EVALUATIONS

[05.10](#)

Registration management

Records relating to the establishment and general administration of the policies, procedures and processes of student registration: registration guides, enrolment lists and statements, registration statistics, etc. Official registration statistics are covered under a separate retention schedule (see schedule [05.04](#)).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		D
secondary [a]	other units concerned	1 year		D

Notes: (D = Destruction R = Retention)

¹ Retention: 3 years. Records created only for purposes of managing registration in a specific academic session may be destroyed immediately after the end of the academic session concerned.

[] = medium ---> a = paper b = microfilm c =electronic d = audio-visual e = other

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05 - STUDENT AFFAIRS / ADMISSIONS, REGISTRATIONS, EVALUATIONS

[05.11](#)

Advanced standing, course exemptions, recognition of earned and transferred credits

Records relating to the establishment and general administration of policies, procedures and processes governing advanced standings, course substitutions and exemptions, recognition of earned credits, mark equivalencies, conditions of credit transfers, etc.

Copy	Unit	Active	Semi-active	Inactive
------	------	--------	-------------	----------

primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	X ¹		D
Notes : (D = Destruction R = Retention) ¹ Retention: As long as records are in effect or until replacement by a new version. ² Archives selection: Retention of official versions (and all updates) of policies, procedures, standards, directives and administrative procedures applied in managing the granting of advanced standings, course exemptions, recognition of earned credits and marks, credit transfers, etc.				
[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other				
PREVIOUS SCHEDULE NEXT SCHEDULE				
				Updated: 14/3/02



05 - STUDENT AFFAIRS / ADMISSIONS, REGISTRATIONS, EVALUATIONS				
05.12	Students files – Electronic records			
Data relating to the monitoring of students admitted and registered: general information about the student, academic progression, courses taken, results by course, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹		D ²
Notes : (D = Destruction R = Retention)				
¹ Retention: 3 years following student's last registration.				
² Destruction: Research value assured by retention of student files on paper (see schedule 05.15). If transcripts of student's marks are not transferred to his/her files, they should be retained in electronic form.				
[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other				
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05 - STUDENT AFFAIRS / ADMISSIONS, REGISTRATIONS, EVALUATIONS				
<u>05.13</u>	Unsuccessful applicants			
Records of applicants to a program of studies who were not accepted by the institution: applications for admission, file analysis forms, admissions committee decisions, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	x ¹	3 years	D
Secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)	
¹ Retention: 1 month after the beginning of the next semester.	
[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other	
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05 - STUDENT AFFAIRS / ADMISSIONS, REGISTRATIONS, EVALUATIONS				
05.14	Students admitted but not registered			
Records of applicants to a program of studies admitted by the institution but who declined or did not register: applications, file analysis forms, admissions committee decisions, official acceptance notifications, letters of refusal, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		D
Secondary [a]	other units concerned	1 year		D
Notes : (D = Destruction R = Retention)				
¹ Retention: 1 year. Files of foreign and post-graduate applicants may be retained for a longer period, according to the policy of the institution.				
[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other				
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05 - STUDENT AFFAIRS / ADMISSIONS, REGISTRATIONS, EVALUATIONS				
05.15	Students admitted and registered			
Records that document the progress of students (full-time, part-time, extension, etc.) from admission to departure from the institution: records and forms dealing with admission, registration, advanced credits, exemptions, course substitutions, graduate studies progression, evaluations and assignment of marks, results obtained, thesis or paper submission and evaluation processes, recommendations for granting of teaching licenses or certificates, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	Unit responsible	X ¹	3 years	R ²
Secondary [a]	Other units concerned	X ³		D

Notes : (D = Destruction R = Retention)				
¹ Retention: 2 years after student's last registration. ² Archives selection: Retention of records documenting the student's provenance, academic progression, courses taken, results obtained and study programs completed. ³ Retention: 1 year after the student's last registration or the transfer of files to the registrar, according to the policies of the institution concerned				
[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other				
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05 – STUDENT AFFAIRS / ADMISSIONS, REGISTRATIONS, EVALUATIONS				
<u>05.16</u>	Student evaluations management - Electronic records			
Data used in the recording and dissemination of students’ academic results: results by course, results by academic session, results by program, official marks of graduates, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [c]	Unit responsible	X ¹		D ²
Notes : (D = Destruction R = Retention)				
¹ Retention: 3 years after student’s last registration.				
² Destruction: Research value ensured by retention of student files on paper (see schedule 05.15). If transcripts of student’s marks are not transferred to his/her files, they should be retained in electronic form.				
[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other				
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05 – STUDENT AFFAIRS / ADMISSIONS, REGISTRATIONS, EVALUATIONS				
05.17	Student evaluations management			
Records relating to the collection, verification and recording of students’ academic results: official student lists, lists of results by course (examinations, practicums, etc.), mark submission forms, transcripts, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	Unit responsible	2 years	3 years	D ¹
Secondary [a]	Other units concerned	1 year		D
Notes : (D = Destruction R = Retention)				
¹ Destruction: Research value assured by retention of student files on paper (see schedule 05.15). If transcripts of student’s marks are not transferred to his/her files, they should be retained in electronic form.				

[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other

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05 – STUDENT AFFAIRS / ADMISSIONS, REGISTRATIONS, EVALUATIONS

05.18

Student discipline

Records relating to the establishment and general administration of policies and procedures to be applied in cases of fraud, plagiarism, falsification of records (signature, title, degree), etc.: records created when a student is brought before the institution's disciplinary committee, statements of infraction, charges, inquiries, complaints, summonses to appear, hearings, disciplinary committee decisions, appeals and penalties or final decisions implemented.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		R ²
secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

¹ Retention: 3 years after final appeal date, rejection or withdrawal of complaint (unfounded complaint).

² Archives selection: Retention of statistical data (if such exist) on cases in a given period. Destruction of other records.

[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other

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05 - STUDENT AFFAIRS / STUDENT SERVICES

05.19

Student services – Electronic records

Data used in the management of guidance services, academic and career information, learning assistance and support, locker rental and financial assistance, as well as special services for foreign students and students with disabilities.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹		D ²

Notes : (D = Destruction R = Retention)

¹ Retention: 3 years after the conclusion of an activity or service (for example, student departure, expiry of bursary, etc.).

² Destruction: Research value ensured by retention of the following paper records: reports and statistics documenting services provided, activities organized, resources available, student participation and evaluation of results (see schedules 05.20 to 05.37).

[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other

PREVIOUS SCHEDULE | NEXT SCHEDULE



05 - STUDENT AFFAIRS / STUDENT SERVICES				
05.20	Student orientation and integration			
Records relating the organization of orientation and integration activities for the institution’s students: pre-registration activities, activities associated with the beginning of the academic year, individual student meetings, group student meetings (by program, faculty, level), etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	3 years		R ¹
secondary [a]	other units concerned	1 year		D
Notes : (D = Destruction R = Retention)				
¹ Archives selection: Retention of records documenting the holding and substance of orientation and integration activities, student participation and evaluation of results. Destruction of support records used in organizing activities.				
[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other				
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05 - STUDENT AFFAIRS / STUDENT SERVICES				
05.21	Protection of student rights			
Records relating to mechanisms for implementing and respecting the provisions of the charter (or declaration) of the rights of the institution's students or of academic, disciplinary or administrative regulations and policies: students' charter of rights, complaint resolution process, redress mechanisms, actions of the university ombudsman, complaint or consultation files, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		R ²
secondary [a]	other units concerned	X ¹		D
Notes : (D = Destruction R = Retention)				
¹ Retention: Until replacement of records by a new version (charter, policies, complaint redress or settlement mechanisms). Only the ombudsman can set rules for retention and access to files containing personal information.				
² Archives selection: Retention of official versions (and all updates) of the charter (or declaration) of student rights and activities and statistics documenting the actions and general recommendations of the institution's ombudsman (such records must not contain any personal information).				
[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other				
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05 - STUDENT AFFAIRS / STUDENT SERVICES				
05.22		Orientation, academic and career information services		
Records relating to the organization and supervision of orientation activities and services (orientation clinics, psychometric tests) and academic and career-related information (defining of educational goals, research, consultations and workshops on trades, professions, study programs, etc.) offered to the institution’s students.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	X ³		D
Notes : (D = Destruction R = Retention)				
¹ Retention: 2 years after conclusion of activity or replacement of records by a new version.				
² Archives selection: Retention of a complete copy of all psychometric tests (documents to be filled out by student, test administration and correction protocols). Retention of reports and statistics documenting services provided, activities organized, student participation and evaluation of results. Destruction of support records.				
³ Retention: 1 year after conclusion of activity or until replacement of records by a new version.				
[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other				
PREVIOUS SCHEDULE NEXT SCHEDULE				
Updated: 14/3/02				



05 - STUDENT AFFAIRS / STUDENT SERVICES				
05.23	Orientation, academic and career information services – Student files			
Files consolidating all information on the users of the institution’s orientation, academic and career-related information services: general information on users, interview summaries and notes, evaluation notes, questionnaires and diagnostic tests, case supervisor reports, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		D ²
secondary [a]	other units concerned	X ³		D
Notes : (D = Destruction R = Retention)				
¹ Retention: 3 years after the last action or consultation. ² Destruction: Research value ensured by retention of general records (not containing any personal information) on orientation, academic and professional information services offered by the institution (see schedule 05.22). ³ Retention: Until closing of file.				
[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other				
PREVIOUS SCHEDULE NEXT SCHEDULE				
Updated: 14/3/02				



05 - STUDENT AFFAIRS / STUDENT SERVICES	
05.24	Learning assistance and support services

Records relating to the organization and supervision of the learning assistance and support activities and services provided to the institution's students: information meetings and workshops on effective studying, time management, note-taking, writing assignments, preparation for oral presentations, stress management, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	X ³		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after conclusion of activity or replacement of records by a new version.

² Archives selection: Retention of activity programs and reports and statistics documenting services provided, activities organized, student participation and evaluation of results. Destruction of support records.

³ Retention: 1 year after conclusion of activity or replacement of records by a new version.

[] = medium ---> a = paper b = microfilm c =electronic d = audio-visual e = other

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05 - STUDENT AFFAIRS / STUDENT SERVICES

05.25

Foreign student services and exchange programs

Records relating to the establishment, organization and supervision of student exchange programs and services provided to foreign students: memoranda of understanding and documentation on exchange programs (objectives, list of participating institutions, names and addresses of those in charge), lists of students participating in exchange programs, supervision of participation conditions and procedures (registration, assistance, insurance, trouble shooting, etc.).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	X ³		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after conclusion of exchange program or replacement of record by a new version.

² Archives selection: Retention of memoranda, reports and statistics documenting operation and implementation of exchange programs and reception of foreign students. Destruction of support records.

³ Retention: until conclusion of program or replacement of record by a new version.

[] = medium ---> a = paper b = microfilm c =electronic d = audio-visual e = other

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05 - STUDENT AFFAIRS / STUDENT SERVICES

05.26

Foreign student services and exchange programs – Student files

Files consolidating all information about students and interns enrolled in exchange programs: general information on participants, academic file copies, correspondence (embassies, funding organizations, etc.), requests for one-time financial assistance, credit advance statements, insurance, reports on stay, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	D
secondary [a]	other units concerned	X ²		D
Notes : (D = Destruction R = Retention) ¹ Retention: 2 years after end of student's exchange. ² Retention: Until termination of student's exchange.				
[] = medium ---> a = paper b = microfilm c =electronic d = audio-visual e = other				
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05 - STUDENT AFFAIRS / STUDENT SERVICES				
05.27		Services for students with disabilities		
Records relating to the implementation and evolution of integration activities and services for students with disabilities: accessibility of buildings, oral and LSQ interpretation services, deployment of human resources (interpreters, note takers, escorts), materiel (wheelchairs, adaptation of buildings, furniture, laboratories), and specialized equipment (Braille printers, digitizers, visual readers, etc.), translation of Braille documents, enlargement of font sizes (course outlines, examinations), assistance approaching professors, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	X ³		D
Notes : (D = Destruction R = Retention)				
¹ Retention: 2 years after conclusion of activity or replacement of document by a new version.				
² Archives selection: Retention of program and activity reports and statistics documenting services provided, activities organized, student participation, and evaluation of results. Retention of samples of documents adapted to students with disabilities (large print, Braille, etc.). Destruction of support records.				
³ Retention: Until conclusion of activity or replacement of record by a new version.				
[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other				
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05 - STUDENT AFFAIRS / STUDENT SERVICES				
05.28		Services for students with disabilities – Student files		
Files consolidating all information on students with disabilities attending the institution: general information on users, correspondence, special conditions, details of services required, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		D ²
Secondary [a]	other units concerned	X ³		D

Notes : (D = Destruction R = Retention)	
¹ Retention: 3 years after termination of student's studies. ² Destruction: Research value ensured by retention of general records (not containing any personal information) on activities and services provided to the institution's students with disabilities (see schedule 05.27). ³ Retention: Until end of student's stay.	
[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other	
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05 - STUDENT AFFAIRS / STUDENT SERVICES				
05.29	Locker rental services			
Records relating to the management of locker rental services for the institution’s students: lists of lockers by building, procedures for opening lockers whose use is not authorized, padlock control and distribution procedures, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		D
secondary [a]	other units concerned	X ¹		D
Notes : (D = Destruction R = Retention)				
¹ Retention: Until replacement of records by a new version.				
[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other				
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05 – STUDENT AFFAIRS / STUDENT SERVICES				
05.30	Locker rental services – Student files			
Files consolidating all the information on students using the institution’s locker rental services: general information on users, rental applications, locker rental forms, padlock borrowing forms, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		D
Secondary [a]	other units concerned	X ²		D

Notes : (D = Destruction R = Retention)	
¹ Retention: 3 years after closing of files. ² Retention: Until closing of files.	
[] = Medium --->a = paper b = microfilm c =electronic d = audio-visual e = other	
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05 - STUDENT AFFAIRS / STUDENT SERVICES				
05.31	Sports teams			
Records relating to the organization and development of the institution's sports teams: recruitment, training, games, publicity, sponsors, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	2 years		D
Notes : (D = Destruction R = Retention)				
¹ Archives selection: Retention of records documenting the creation, composition, activities and achievements (particularly trophies won) of the institution's sports teams.				
[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other				
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05 - STUDENT AFFAIRS / STUDENT SERVICES				
05.32	Financial assistance services			
Records relating to the establishment and general administration of the financial aid services offered to the institution's students: dissemination of information on loans and bursaries (correspondence, documentation, statistics), lists of grant organizations, lists of applicants, bursary students, bursary applications rejected, support measures for students in the process of obtaining financial assistance needed to continue their studies, budget planning advice, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	4 years	R ¹
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)	
¹ Archives selection: Retention of program and activity summary reports and statistics documenting services provided, student participation and financial assistance awarded or obtained. Destruction of support records.	
[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other	
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05 - STUDENT AFFAIRS / STUDENT SERVICES				
05.33	Institution loans and bursaries			
Records relating to the management of loans and bursaries awarded by the institution: management of applicants, operations of selection committees, lists and profiles of bursary winners, statistics, correspondence, financial contingency contracts, credit advance policies, financial assistance to doctoral students, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	4 years	R ¹
secondary [a]	other units concerned	2 years		D
Notes : (D = Destruction R = Retention)				
¹ Archives selection: Retention of programs, reports, statistics, lists of bursary winners, as well as records reflecting the institution's loan and bursary grant policies. Destruction of support records.				
[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other				
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05 - STUDENT AFFAIRS / STUDENT SERVICES				
05.34	Government loans and grants			
Records relating to the management of loan and grant programs operated by various government organizations: distribution lists, loans and grants not awarded, publicity, statistics, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years		R ¹
secondary [a]	other units concerned	1 year		D
Notes : (D = Destruction R = Retention)				
¹ Archives selection: Retention of recapitulative statistics documenting the awarding of government loans and grants to institution students. Destruction of support records.				

[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other

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05 - STUDENT AFFAIRS / STUDENT SERVICES

05.35

Loans and grants awarded by outside organizations

Records relating to the management of loans and grants awarded by various external organizations: lists of grant applicants, acceptance notifications, correspondence concerning issuing of cheques, lists of grant winners, lists of unsuccessful applicants, statistics, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years		D ¹
secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retention of recapitulative statistics documenting the awarding of loans and grants by outside organizations to institution students. Destruction of support records.

[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other

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05 - STUDENT AFFAIRS / STUDENT SERVICES

05.36

Financial aid services – Student files

Files consolidating information on students applying for financial assistance (loans, bursaries, grants) from the institution, from government agencies or from outside organizations: general information on applicants, financial, social and family situations, school files, letters of recommendation, examiners' reports, nature and terms/conditions of assistance granted, means of repayment, discharge, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	4 years	R ¹
secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retention of files of recipients of major scholarships.

[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other

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05 - STUDENT AFFAIRS / STUDENT SERVICES				
05.37	Job-search services			
Records relating to the management of job-search assistance services for the institution’s students and graduates: consultation days for reviewing curricula vitae, preparatory employment interview counselling, consultations of positions-available job-banks, recruitment activities, information booths, talks, information meetings on job placement, curriculum vitae banks, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		R ²
secondary [a]	other units concerned	X ³		D
Notes : (D = Destruction R = Retention)				
¹ Retention: 2 years after conducting activity or replacement of record by a new version. Retain curricula vitae 1 year.				
² Archives selection: Retention of programs, activity reports and statistics documenting students’ use of student job-placement assistance services.				
³ Retention until activity is held or replacement of record by a new version.				
[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other				
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05 - STUDENT AFFAIRS / STUDENT ACTIVITIES AND ORGANIZATIONS				
05.38	Student activities			
Records relating to the organization of activities to encourage participation and socializing by the institution's students: encounter activities within a program of studies, orientation activities organized by students at the beginning of the academic year, recreational activities, creation and development of professional contact networks, evening get-togethers, noon-hour discussion groups, conference days, student newsletters and newspapers, student-participation recognition policies (statement, synthesis reports, awarding of credits for participation), etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	1 year		D
Notes : (D = Destruction R = Retention)				
¹ Archives selection: Retention of promotional materials and reports documenting student activities organized with institution support (for example, orientation activities, festivals etc.). Destruction of support records (student newsletters and newspapers are not preserved in the institution's archives but may be retained in the private archives collections of the student organizations that produced them, if such exist).				
[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other				
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05 - STUDENT AFFAIRS / STUDENT ACTIVITIES AND ORGANIZATIONS				
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05.39	Intervarsity competitions			
Records relating to the participation of institution students in intervarsity competitions – academic, scientific, artistic, athletic, law-related, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	1 year		D
Notes : (D = Destruction R = Retention)				
¹ Archives selection: Retention of records documenting the participation of the institution’s students in intervarsity competitions and the results obtained.				
[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other				
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05 - STUDENT AFFAIRS / STUDENT ACTIVITIES AND ORGANIZATIONS				
05.40	Student organizations			
Records relating to the institution’s students’ associations, organizations and groups: requests for recognition or accreditation, charters, executives, membership lists, structures (relations with similar organizations in other universities), etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D
Notes : (D = Destruction R = Retention)				
¹ Retention: 2 years after termination of recognition or accreditation.				
² Archives selection: Retention of records documenting the creation, recognition and achievements of associations, organizations and groups of institution students. Destruction of support records (for example, forms and correspondence relating to the collection of dues).				
[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other				
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05 - STUDENT AFFAIRS / GRADUATES	
05.41	Convocation
Records relating to the organization of convocation ceremonies for the institution's graduates: lists of graduates by sector, presentation speeches, protocols, albums, etc.	

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	1 year		D
Notes : (D = Destruction R = Retention) ¹ Retention: 1 year after convocation ceremonies. ² Archives selection: Retention of official institution publications. Destruction of support records.				
[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other				
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05 - STUDENT AFFAIRS / GRADUATES				
05.42	Graduates - Electronic records			
Data used to identify degrees conferred on graduates and to maintain contact with the institution's graduates: personal data, degree obtained and date, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹		R
Notes : (D = Destruction R = Retention)				
¹ Retention: Until the 100th anniversary of graduate's birth.				
[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other				
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05 - STUDENT AFFAIRS / GRADUATES				
05.43	Graduates			
Records relating to the identification of graduates and the institution’s relations with its alumni: graduate lists and logs, reports and statistics on graduates, alumni association files (sectoral or program associations), etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)	
¹ Archives selection: Retention of cumulative logs of graduates (or equivalent) and records documenting the creation, recognition and achievements of associations and groups of alumni. Destruction of support records.	
[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other	
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05 - STUDENT AFFAIRS / GRADUATES				
05.44	Alumni activities			
Records relating to the organization of activities and services to encourage involvement, participation and social activities of institution alumni: alumni services (library, Internet, courses, seminars, watches, credit cards, insurance, etc.), exchange activities between alumni and students of the same department, recreational activities, reunions and homecomings, lunch-hour discussions, one-day conferences, alumni newsletters and magazines, involvement of alumni in the institution's fundraising committees and campaigns, etc.				
Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	1 year		D
Notes : (D = Destruction R = Retention)				
¹ Archives selection: Retention of promotional materials, publications and reports documenting alumni activities and types of services offered by the institution. Destruction of support records (alumni association newsletters and magazines are not preserved in the institution's archives, but may be retained in the private archives collections of the alumni associations that produced them).				
[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other				
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End of Category : 5 - Student Affairs



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06 – COMMUNITY SERVICES

06 - COMMUNITY SERVICES / COMMUNITY SERVICES				
<u>06.01</u>	Community services – Electronic records			
Data used in the management of health services, legal assistance, and sports, food and social and cultural services offered to students of the institution and members of the surrounding community.				
copy	unit	active	Semi-active	inactive
primary [c]	unit responsible	X ¹		D ²
Notes: (D = Destruction R = Retention)				
1 Retention: As long as service is provided or 5 years after last file entry. 2 Destruction: Research value ensured by retention of the following paper records: programs, protocols, contracts, agreements, reports and statistics documenting services provided, activities organized, resources available, user participation and evaluation of results obtained (see schedules 6.02 to 06.17).				
[] =medium --->a = paper b = microfilm c = electronic d = audio-visual e =other				
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06 - COMMUNITY SERVICES / COMMUNITY SERVICES				
06.02	Community service projects			
Records dealing with the organization of educational, research and consultation activities provided by the institution to the surrounding community: correspondence, protocols, contracts, agreements, activities and programs, promotion and marketing of activities, reports, etc.				
copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)				
¹ Retention: 2 years after termination of project. ² Archives selection: Retention of correspondence, programs, protocols, contracts, agreements, reports and statistics providing descriptions and documenting principal achievements and participation obtained. Destruction of support records (registrations, financial management, etc).				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e =other				
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06 - COMMUNITY SERVICES / HOUSING SERVICES				
06.03	Housing services			
Records dealing with the management of student housing services: policies and regulations, reference banks of accommodations and rooms for students to rent, sublet or share, university residences, refrigerator rentals, etc.				
copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹		R ²
secondary [a]	other units concerned	X ¹		D
Notes : (D = Destruction R = Retention)				
1 Retention: Until replacement of records by a new version. Retain records dealing with the management of subsidiary services available to clients of university residences (furniture rentals, etc) for 3 years.				
2 Archives selection: Retention of policies and regulations, inventories of residences owned by the institution, and reports and statistics documenting student use. Destruction of support records.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e =other				
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06 – COMMUNITY SERVICES / HOUSING SERVICES				
<u>06.04</u>	Housing services - User files			
All records on users of the institution’s housing services: general user information, rental requests, rental contracts or renewals, correspondence with landlords and departure notifications.				
copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹		D
secondary [a]	other units concerned	X ²		D

Notes :		(D = Destruction R = Retention)
¹ Retention: 3 years after closing of file. ² Retention: Until closing of file.		
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e =other		
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06 – COMMUNITY SERVICES / HEALTH SERVICES				
06.05	Health services			
Records dealing with the management of health services provided to the institution's students and the surrounding community: planning and organization of health services (preventive and screening activities, medical, psychological, psychiatric, dental and optometry clinics, etc.) and psychological assistance and information services (information centres, workshops and individual or group consultations).				
Copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	8 years	R ²
secondary [a]	other units concerned	X ³		D
Notes : (D = Destruction R = Retention)				
1 Retention: 2 years after conducting activity or replacement of records by new version.				
2 Archives selection: Retention of programs, activity reports and statistics documenting services provided or activities organized, client participation and evaluation of results obtained. Destruction of support records.				
3 Retention: Until termination of activity or replacement of records by new version.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e =other				
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06 – COMMUNITY SERVICES / HEALTH SERVICES				
<u>06.06</u>	Health services - User files			
All records on users of the health services provided by the institution (medical, psychological, psychiatric, dental and optometry clinics, etc): general user information, case histories, examinations, diagnoses, care prescribed, progress reports, etc.				
copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	X ²	D ³
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)				
¹ Retention: In the office of the practitioner concerned, 2 years after last file entry. ² Before user files are transferred to archives, practitioners should provide archives with specific and detailed instructions stating the persons (functions) who should have access to files and the terms and conditions of retention and handling, particularly retention periods, which cannot be less than 5 years in compliance with the legal requirements for retention of practitioner records. ³ Destruction according to the terms and conditions of the practitioner's instructions. Destruction where there are no instructions or it is impossible to get instructions from the practitioner. Institutions that deem it appropriate to retain certain files for their research value may select samples or specimens on condition that the files are not personal and with the consent of the practitioner.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e =other				
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06 - COMMUNITY SERVICES / LEGAL ADVICE SERVICES				
06.07	Legal advice services			
Records dealing with the management of legal services provided to the institution’s students and the surrounding community: planning and organization of legal consultation services (legal clinics), legal assistance and information (kiosks, workshops and individual or group consultations).				
copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	8 years	R ²
secondary [a]	other units concerned	X ³		D
Notes : (D = Destruction R = Retention)				
¹ Retention: 2 years after conducting activity or replacement of records by new version.				
² Archives selection: Retention of programs, activity reports and statistics documenting services provided, activities organized, client participation and evaluation of results. Destruction of support records.				
³ Retention: Until conclusion of activity or replacement of records by new version.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e =other				
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06 – COMMUNITY SERVICES / LEGAL ADVICE SERVICES				
06.08	Legal advice services – User files			
All records on users of the institution’s legal advice services (legal clinics): general user information, consultation summaries, legal correspondence, counselling, referrals, resolutions, etc.				
copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	X ²	D ³
secondary [a]	other units concerned	X ¹		D

Notes :(**D** = Destruction **R** = Retention)¹ Retention: In practitioner's office 2 years after last file entry.² Before user files are transferred to archives, practitioners should provide archives with specific and detailed instructions stating the persons (functions) who should have access to files and the terms and conditions of retention and handling, particularly retention periods, which cannot be less than 5 years in compliance with the legal requirements for retention of practitioner records.³ Destruction according to the terms and conditions of the practitioner's instructions. Destruction where there are no instructions or it is impossible to get instructions from the practitioner. Institutions that deem it appropriate to retain certain files for their research value may select samples or specimens on condition that the files are not personal and with the consent of the practitioner.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e =other

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**06 - COMMUNITY SERVICES / ATHLETICS****06.09****Athletics**

Records dealing with the management of sports and athletic programs and facilities available to the student population and surrounding community: recruitment and registration of members, planning and organization of activities (free or organized activities, sports leagues, training programs), utilization (reservations, use) of facilities (gymnasiums, training rooms, swimming pools, outdoor recreational areas, outdoor sports fields, etc.), sports equipment (reservations, loans).

copy	unit	Active	semi-active	inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	2 years		D

Notes :(**D** = Destruction **R** = Retention)¹ Archives selection: Retention of programs, activity reports and statistics documenting use and users of sports services.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e =other

PREVIOUS SCHEDULE | NEXT SCHEDULE

Updated: 14/3/02

**06 - COMMUNITY SERVICES / ATHLETICS****06.10****Athletics - User files**

All records on users of the institution's sports and athletic services: general user information, registration forms, registration fee receipts, physical evaluation forms, training progress monitoring forms, personalized training programs, etc.

copy	Unit	active	semi-active	Inactive
primary [a]	unit responsible	3 years		D
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)	
¹ Retention: Until closing of file.	
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e =other	
PREVIOUS SCHEDULE NEXT SCHEDULE	
Updated: 14/3/02	



06 – COMMUNITY SERVICES / FOOD SERVICES				
06.11	Food services			
Records dealing with the management of food services provided to the institution's clients (restaurants and cafeterias, catering and beverage services, automatic food-dispensing machines, etc.): food supplies inventory forms, menus, recipes, meal and reception organization, cash register tapes, etc.				
copy	unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	D
secondary [a]	other units concerned	2 years		D
Notes : (D = Destruction R = Retention)				
1 Retention: 2 years or as long as records are in effect.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e =other				
PREVIOUS SCHEDULE NEXT SCHEDULE				
Updated: 14/3/02				



06 - COMMUNITY SERVICES / FOOD SERVICES				
06.12	Food services - User files			
All records on users of the institution's food services: general user information, order forms, special requirements, reception and function reports, etc.				
copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	D
secondary [a]	other units concerned	2 years		D
Notes : (D = Destruction R = Retention)				

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e =other
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06 - COMMUNITY SERVICES / SOCIAL AND CULTURAL SERVICES				
06.13	Social and cultural services			
Records dealing with the management of social and cultural services available to the institution's clients: user registration procedures, planning and organization of social and cultural activities (outreach, educational, social and special programs, activities of artistic, cultural and scientific groups), etc.				
copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	2 years		D
Notes : (D = Destruction R = Retention)				
1 Archives selection: Retention of programs, activity reports and statistics documenting the organization and content of social and cultural activities.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e =other				
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06 - COMMUNITY SERVICES / SOCIAL AND CULTURAL SERVICES				
06.14	Social and cultural services - User files			
All records on users of social and cultural services offered by the institution: general user information, registration forms, registration fee receipts, etc.				
copy	unit	Active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	D
secondary [a]	other units concerned	2 years		D
Notes : (D = Destruction R = Retention)				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e =other				
PREVIOUS SCHEDULE NEXT SCHEDULE				
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06 - COMMUNITY SERVICES / SOCIAL AND CULTURAL SERVICES				
06.15	Exhibitions			
Records dealing with the organization and presentation of exhibitions by the institution or one of its components: lists of works, explanatory texts, correspondence, installation plans, depictions of works exhibited, insurance contracts, catalogues, press releases, invitations, etc.				
copy	unit	Active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D
Notes : (D = Destruction R = Retention)				
¹ Retention: 2 years following conclusion of exhibition. ² Archives selection: Retention of reports and statistics on exhibitions, catalogues (including lists and depictions of works shown), specimens of invitations and posters, texts of speeches given at openings, contracts, explanatory texts, press releases and significant correspondence. Destruction of support records.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e =other				
PREVIOUS SCHEDULE NEXT SCHEDULE				
Updated: 14/3/02				



06 - COMMUNITY SERVICES / CONFERENCES, SYMPOSIUMS, CHARITABLE ACTIVITIES				
06.16	Conferences and symposiums			
Records relating to conferences and symposiums held or organized by the institution or one of its components: correspondence, programs, conference proceedings, lists of participants, (posters, financial records, etc. Records dealing with the organization of and participation in outside conferences and symposiums by members of the institution are covered in a separate retention schedule (see schedule 01.11).				
copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	2 years		D
Notes : (D = Destruction R = Retention)				
1 Archives selection: Retention of records significantly documenting the organization and holding of conferences and symposiums according to the nature and importance of subject matter and in light of the institution’s mission (organizing committee minutes, programs, conference proceedings, financial statements, conference documents, lists of participants). Destruction of support records (reservation of rooms and equipment, logistical and financial management, etc).				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e =other				
PREVIOUS SCHEDULE NEXT SCHEDULE				
Updated: 14/3/02				



06 - COMMUNITY SERVICES / CONFERENCES, SYMPOSIUMS, CHARITABLE ACTIVITIES	
06.17	Charitable activities

Records dealing with charitable activities involving the institution and members of the university community: charitable fundraising (e.g. United Way), Christmas hampers, Red Cross blood-donor clinics, canvassing and collecting (money, clothing, etc.) for underprivileged families, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	2years		D

Notes : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of significant correspondence and reports documenting charitable activities involving the institution and their results. Destruction of support records connected with logistical organization of activities.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e =other

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Updated: 14/3/02

End of Category: 06 - COMMUNITY SERVICES



[01 - Administration](#) | [02 - Human Resources](#) | [03 - Financial Resources](#) |
[04 - Real and Movable Property](#) | [05 - Students Affairs](#) | **06 - Community Services** |
[07 - Teaching](#) | [08 - Research and Development](#) | [09 - Information and Communications](#)



Records Retention Schedules for
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07 – TEACHING

07 - TEACHING / TEACHING ORGANIZATION				
07.01	Organization of teaching activities – General			
Records dealing with the organization, structure and operation of teaching: organizational structures (creation and organization of faculties, schools, departments, etc.), program organization (principles and regulations governing admission, registration, student evaluation and the issuing of degrees), general program and course administration, etc.				
copy	Unit	active	Semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ¹		D
N o t e s : (D = Destruction R = Retention)				
1 Retention: 2 years after closing of file or replacement of records by a new version. 2 Archives selection: Retention of records documenting general teaching administration. Destruction of support records.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
(To Category 06) PREVIOUS SCHEDULE NEXT SCHEDULE				
				Updated: 14/3/02



07 - TEACHING / TEACHING ORGANIZATION				
07.02	Programs - Electronic records			
Data used in the description and evaluation of the institution’s educational programs: program banks (indexes), program activities (descriptions of required activities within each program), banks of questions used in program evaluations.				
copy	Unit	Active	semi-active	inactive

primary [c]	unit responsible	X ¹		R
Notes : (D = Destruction R = Retention)				
¹ Retention: 5 years after discontinuing a version of a program or 2 years after a program evaluation.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
PREVIOUS SCHEDULE NEXT SCHEDULE				
				Updated: 14/3/02



07 - TEACHING / TEACHING ORGANIZATION				
07.03	Programs: Feasibility, planning and implementation			
Records dealing with the development of the institution's educational programs: program feasibility and development files (adopted or not adopted), program approval certifications, program commencement authorizations, etc.				
copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D
Notes : (D = Destruction R = Retention)				
1 Retention: Files of adopted projects, 2 years after major modification or cancellation and complete cessation of a program's activities. Retention of files of projects not adopted: for 2 years following final decision.				
2 Archives selection: Retention of records from beginning of program creation process, plans and recapitulative reports documenting program planning and development processes (exploration and development committees). Destruction of support records.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
PREVIOUS SCHEDULE NEXT SCHEDULE				
				Updated: 2000-03-14



07 – TEACHING / TEACHING ORGANIZATION	
07.04	Programs: General evaluations and changes
Records dealing with the evaluation of and changes to the institution's educational programs: periodic evaluation plans, evaluation files (consultations with program directors, professors and students, evaluation indicators), files of program modifications (minor revisions, major changes), etc.	

copy	unit	Active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D
Notes : (D = Destruction R = Retention)				
¹ Retention: 2 years after program evaluation or modification. ² Archives selection: Retention of recapitulative reports documenting general program evaluations and changes. Destruction of support records.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
PREVIOUS SCHEDULE NEXT SCHEDULE				
Updated: 14/3/02				



07 - TEACHING / TEACHING ORGANIZATION				
<u>07.05</u>	Programs: Financial evaluations			
Records dealing with the cost evaluation of the institution’s programs: cost/benefit studies, resources required, revenues generated, etc.				
copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D
Notes : (D = Destruction R = Retention)				
¹ Retention: 2 years after financial evaluation of program. ² Archives selection: Retention of recapitulative reports documenting costs of various programs. Destruction of support records.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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Updated: 14/3/02				



07 – TEACHING / TEACHING ORGANIZATION	
<u>07.06</u>	Program indexes

Records dealing with the nomenclature, classification systems and identification of the institution's programs: lists of official program titles, degrees and corresponding abbreviations, breakdowns of programs by teaching and research fields, etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years after replacement of records by a new version.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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07 – TEACHING / TEACHING ORGANIZATION

07.07

Undergraduate program management

Records dealing with the general administration of each of the institution's undergraduate programs: lists of program directors, objectives, general and special admission and registration requirements, development (reports on minor and major modifications), individual programs, transferability or compatibility with other programs, lists of equivalent programs in other institutions, admission and registration statistics, tracking of success, failure and drop-out rates, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years after termination of program and complete cessation of its activities.

² Archives selection: Retention of reports, statistics and all significant records documenting the program's development. Destruction of support records or records whose data are available in a more comprehensive record.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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07 - TEACHING / TEACHING ORGANIZATION**07.08****Graduate program management**

Records dealing with the general administration of each of the institution's graduate programs: program histories, correspondence, lists of program directors, objectives, general and special admission and registration requirements, development (reports of minor and major changes), individual programs, transferability or compatibility with other programs, lists of equivalent programs in other institutions, admission and registration statistics, tracking of success, failure and drop-out rates, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years after termination of program and complete cessation of its activities.

² Archives selection: Retention of reports, statistics and all records significantly documenting the program's evolution. Destruction of support records or records whose data are available in a more comprehensive record.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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**07 - TEACHING / TEACHING ORGANIZATION****07.09****Continuing education programs**

Records dealing with the general administration of each of the institution's continuing education programs (continuing professional education, adult education): program histories, correspondence, lists of program directors, general and special admission and registration requirements, development, transferability or compatibility with other programs, admission and registration statistics, tracking of success, failure and drop-out rates, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years after termination of program and complete cessation of its activities.

² Archives selection: Retention of reports, statistics and all significant records documenting the program's evolution. Destruction of support records or records whose data are available in a more comprehensive record.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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07 - TEACHING / TEACHING ORGANIZATION

07.10

Distance education programs

Records dealing with the general administration of each of the institution's distance education programs (televised courses, telephone tutoring, correspondence courses, Internet courses, etc.): program histories, correspondence, operations, lists of program directors, objectives, general and special admission and registration requirements, transferability or compatibility with other programs, admission and registration statistics, tracking of success, failure and drop-out rates, etc.

copy	Unit	Active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after termination of program and complete cessation of all its activities.

² Archives selection: Retention of reports, statistics and all significant records documenting the program's evolution. Destruction of support records or records whose data are available in a more comprehensive record.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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07 - TEACHING / TEACHING ORGANIZATION

07.11

Special programs

Records dealing with the general administration of each of the institution's special programs (seminars, workshops, non-credit activities or where the number of credits exceeds the requirement): program histories, correspondence, lists of program directors, objectives, general and special admission and registration conditions, development, transferability or compatibility with other programs, registration statistics, tracking of success, failure and drop-out rates, etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after termination of program and complete cessation of all its activities.

² Archives selection: Retention of reports, statistics and all significant records documenting the program's evolution. Destruction of support records or records whose data are available in a more comprehensive record.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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07 – TEACHING / TEACHING ORGANIZATION

07.12

Extension training programs

Records dealing with the general administration of the institution's extension training activities (seminars, workshops, non-credit activities or where the number of credits exceeds the requirement, individual programs): course programs and educational activities, correspondence, costs, registration management, documentation sent to participants, records dealing with the hiring and payment of educators and speakers, participation certification management, reports on participation, satisfaction evaluations, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retention of programs, course outlines, reports and statistics documenting the organization of and participation in extension activities. Retention of official records certifying participants' success and results obtained (continuing education credits awarded, participation confirmations) and sample certificates of participation (for each activity). Destruction of copies and originals of unclaimed certificates, support records relating to management of budget for services, course notes and materials (texts, overhead transparencies, etc.) supplied by instructors or lecturers.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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07 - TEACHING / TEACHING ORGANIZATION

07.13

Off-campus teaching

Records dealing with the general administration of the institution's off-campus teaching services: off-campus course programs and educational activities, memorandums of agreement with other institutions (premises, resources), correspondence, operation of services, admission and registration statistics, etc.

copy	Unit	active	semi-active	inactive
Primary [a]	unit responsible	2 years	5 years	R ¹
Secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retention of significant records documenting the development of the institution's off-campus teaching services. Destruction of support records or records whose data are available in a more comprehensive record.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other



07 – TEACHING / TEACHING ORGANIZATION

[07.14](#)**Program accreditation and certification**

Records relating to the accreditation and certification of certain of the institution's programs (recognition by a professional body, college or corporation of the program's standards and the professional title associated with it): correspondence, accreditation certificates, etc.

copy	unit	active	semi-active	inactive
Primary [a]	unit responsible	2 years	5 years	R
Secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other



07 - TEACHING / TEACHING MANAGEMENT

[07.15](#)**University / Academic timetable**

Records describing and timetabling the main stages of the academic year.

copy	Unit	active	semi-active	inactive
Primary [a]	unit responsible	2 years		R ¹
Secondary [a]	other units concerned	2years		D

Notes :		(D = Destruction R = Retention)
¹ Archives selection: Retention of final versions of university calendar. Destruction of working records and preliminary versions.		
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other		
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		Updated: 14/3/02



07 – TEACHING / TEACHING MANAGEMENT				
07.16	Academic sessions organization - Electronic records			
Data used in the organization and management of the activities of the institution’s academic sessions: required courses, target mean class sizes, assignment of teaching duties and course loads, supervision of teaching assistants, master timetables (course designations, schedules, professors’ names, locations, times, numbers of students, etc.				
copy	Unit	active	semi-active	inactive
primary [c]	unit responsible	2 years		D ¹
Notes :		(D = Destruction R = Retention)		
1 Destruction: Research value ensured by retention of the following paper records: university calendars, (schedule 07.15), course accommodation capacities (schedule 07.18), target mean class sizes (schedule 07.19), master timetables (schedule 07.22), etc.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
PREVIOUS SCHEDULE NEXT SCHEDULE				
Updated: 14/3/02				



07 – TEACHING / TEACHING MANAGEMENT				
07.17	Academic sessions organization			
Records dealing with the general administration and organization of the institution’s academic sessions: required course, target mean class sizes, lists of teaching assignments and course loads, lists of teaching assistants, master timetables, correspondence, timetable changes, statistics, etc.				
copy	Unit	Active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	D

secondary [a]	other units concerned	2 years		D
Notes : (D = Destruction R = Retention)				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
PREVIOUS SCHEDULE NEXT SCHEDULE				
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07 – TEACHING / TEACHING MANAGEMENT				
07.18	Course accommodation capacities			
Records relating to the number of students admitted to a program or registered in a course section: evaluation of accommodation capacity by program and course section, lists of maximum student numbers by course section, capacity increase or reduction rationales, correspondence, etc.				
copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	2 years		D
Notes : (D = Destruction R = Retention)				
1 Archives selection: Retention of records documenting capacity evaluations, increases or reductions and the institution’s policies and practices governing student numbers (unless the same information is available in admissions policy records, which are covered under schedule 05.08). Destruction of support records.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
PREVIOUS SCHEDULE NEXT SCHEDULE				
Updated: 14/3/02				



07 - TEACHING / TEACHING MANAGEMENT	
<u>07.19</u>	Mean class sizes
Records dealing with the setting of mean numbers of students per class by course section for each program and level.	

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	R
secondary [a]	other units concerned	2 years		D
Notes : (D = Destruction R = Retention)				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
PREVIOUS SCHEDULE NEXT SCHEDULE				
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07 – TEACHING / TEACHING MANAGEMENT				
07.20	Course loads			
Records dealing with the allocation of teaching assignments among faculty members in a given session: course section tables, teaching duties, lists of teaching assignments, correspondence, etc.				
copy	unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	D
secondary [a]	other units concerned	2 years		D
Notes : (D = Destruction R = Retention)				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
PREVIOUS SCHEDULE NEXT SCHEDULE				
Updated: 14/3/02				



07 - TEACHING / TEACHING MANAGEMENT	
07.21	Course load allocation

Records dealing with allocation of course loads in a given session (postings, candidates, recommendations, assignments): course load eligibility lists, course load allocation recommendations, course load distribution, lists of course load assignments, lists of courses cancelled or withdrawn, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	D
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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07 – TEACHING / TEACHING MANAGEMENT

07.22

Course master timetables

Records listing the designation, title, section numbers, schedules, locations and number of student places available for each of the courses offered in a given session.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of official version of master timetable. Destruction of preliminary versions and working files.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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07 – TEACHING / TEACHING MANAGEMENT

<u>07.23</u>	Courses - Electronic records			
Data used in the management of the institution's courses: activity and course indexes (course subject, number and title, number of credits, prerequisites, etc.), course descriptions for all programs, changes, additions, withdrawals of courses, etc.				
copy	unit	Active	semi-active	inactive
primary [c]	unit responsible	X ¹		D ²
Notes : (D = Destruction R = Retention)				
¹ Retention: 10 years after termination or modification of course.				
² Destruction: Research value ensured by retention of the following paper records: course calendars, files, outlines, assigned material and notes (see schedules 07.24 to 07.28).				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
PREVIOUS SCHEDULE NEXT SCHEDULE				
Updated: 14/3/02				



07 - TEACHING / TEACHING MANAGEMENT				
07.24	University calendars			
Records containing course descriptions for all programs offered by the institution in a given academic year: calendars, changes, additions, course withdrawals, correspondence, etc.				
copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	2 years		D
N o t e s : (D = Destruction R = Retention)				
1 Archives selection: Retention of the official version (and all updates) of university calendars. Destruction of working records.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
PREVIOUS SCHEDULE NEXT SCHEDULE				
Updated: 14/3/02				



07 - TEACHING / TEACHING MANAGEMENT

07.25

Course management - General

Records dealing with the general administration of all courses offered by the institution: objectives, general and special registration requirements, evolution (reports on minor and major changes in course content), transferability or compatibility with other courses, list of course prerequisites, registration statistics, etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of significant records documenting the development of course content. Destruction of support records or records whose data are available in a more comprehensive record.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Updated: 14/3/02



07 - TEACHING / TEACHING MANAGEMENT

07.26

Course management

Records used in the management of each of the institution's courses: course outlines, student lists, exercises, assignment and examination questions and work returned, orders and sales of course notes, correspondence, etc.

copy	unit	active	semi-active	inactive
primary [a]	Unit responsible	2 years	5 years	R ¹
secondary [a]	Other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of records documenting course organization (descriptions, course outlines, bibliographies, records used in student evaluations, etc.). Destruction of support records (preliminary student lists, requests for mark changes, etc).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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07 - TEACHING / TEACHING MANAGEMENT

07.27

Course outlines

Records containing the designation, title, description, content, general and specific objectives, schedule and evaluation procedures for each of the institution's courses.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	R
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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07 - TEACHING / TEACHING MANAGEMENT

07.28

Course material and notes

Documents handed out or sold to students by professors for course use and disseminated by photocopy, print, the Internet, etc: detailed outlines for each course, explanatory notes, exercises, copies of reference texts, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of compilations of material whose contents document course methodology and content in an original and substantive manner. Destruction of collections of photocopied texts (extracts of books and journals).

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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07 - TEACHING / TEACHING MANAGEMENT

07.29

Laboratories, seminars, overview activities

Records used in the management of the institution's laboratories, seminars and overview activities: outlines, student lists, exercises, examination questions and results, reports, correspondence, etc.

copy	unit	Active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retention of records documenting the organization of laboratories, seminars and overview activities: descriptions, activity plans, records used in student evaluations, etc. Destruction of support records (activities organization, room and equipment reservations, etc).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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07 - TEACHING / TEACHING MANAGEMENT

07.30

Practicums, internships and co-ops

Records used in the organization and management of practicums, internships and co-op programs offered to institution students: handbooks, contracts, placement data banks, management of practicums, internships and co-ops (projects, statements of purpose, requests for admission, placement confirmations, project summaries, procedures, activities planned, evaluation methods, etc.)

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retention of significant records summarizing the organizational methodology of practicums, relations established between the institution and practicum placement situations, placement statistics, etc. Destruction of support records used in organizing practicums, co-ops and internships.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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07 - TEACHING / TEACHING MANAGEMENT

07.31

Student trainee files

All records pertaining to students undertaking a practicum, internship, co-op or other training period within the context of their study program: statement of purpose forms, financial commitments, placement confirmations, contracts, correspondence, evaluation forms completed by supervisors, reports, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	D ¹
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **C** = Retention)

¹ Destruction: Depending on institution policy, certain records may be transferred to the student's file (see schedule [05.15](#)).

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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07 – TEACHING / TEACHING MANAGEMENT

07.32

Academic pedagogy

Records dealing with the planning, development and use of various teaching methodologies and tools: pedagogical development plans (objectives, funds, etc.), specific teaching and educational projects, reports on the development and use of teaching media, lists of teaching materials, correspondence, etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes :		(D = Destruction R = Retention)
¹ Retention: As long as records are in effect. ² Archives selection: Retention of reports, studies and statistics documenting the development of the institution's pedagogical methodologies.		
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other		
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07 – TEACHING / TEACHING MANAGEMENT				
07.33	Teaching evaluations - Electronic records			
Data used to manage evaluation of the teaching provided by the institution’s professors and lecturers: course designation, section number, instructor’s name, evaluation criteria, number of respondents, number of questionnaires, results by criterion, overall results, etc.				
copy	unit	active	semi-active	inactive
primary [c]	unit responsible	X ¹	5 years	D
Notes :		(D = Destruction R = Retention)		
¹ Retention: 1 session after compilation of results.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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07 - TEACHING / TEACHING MANAGEMENT				
<u>07.34</u>	Teaching evaluations			
Records dealing with evaluation of the teaching provided by the institution's professors and lecturers: questionnaires, evaluation procedures, individual reports and overall results.				
copy	unit	active	semi-active	inactive

primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D
Notes : (D = Destruction R = Retention) ¹ Retention: 2 years after compilation of results for a given session. ² Archives selection: Retention of result compilations and a specimen questionnaire.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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07 – TEACHING / STUDENT EVALUATION				
07.35	Grading Systems / Evaluation Methodology			
Records dealing with the establishment and application of measures and criteria for the evaluation of student achievement: grading systems, methodologies, techniques and general and specific criteria used in student evaluations, teacher-student evaluation agreements, examination invigilation procedures, etc.				
copy	unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D
Notes : (D = Destruction R = Retention)				
¹ Retention: 2 years or as long as records are in effect (criteria, procedures, etc). ² Archives selection: Retention of techniques, criteria and general methodological guidelines. Destruction of records associated with student evaluation in specific courses, as integrity of research is ensured by retention of course outlines documenting specific evaluation procedures (see schedule 07.27).				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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07 - TEACHING / STUDENT EVALUATIONS	
<u>07.36</u>	Tutoring

Records dealing with organized activities to help students prepare to take a degree, an exam or a competition: programs, teaching materials, correspondence, lists of resource persons and participants, etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of programs and reports substantively documenting tutoring activities conducted and student participation. Destruction of support records.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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07 - TEACHING / STUDENT EVALUATIONS

07.37

Examinations and tests

Records used in evaluating student levels of learning and knowledge acquisition: examination and test questions, examination papers and workbooks (completed by students), answer keys, marking criteria, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	X ²	R ³

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: Completed examination papers and workbooks according to retention policy of each institution. Retain examination questions, answer keys and marking criteria for 2 years.

² Retention: 5 years for examination questions, answers and marking criteria (destruction of examination papers and workbooks).

³ Archives selection: Retention of examination questions, answers and marking criteria.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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07 – TEACHING / STUDENT EVALUATIONS

<u>07.38</u>	Student work			
Work done by students as part of their courses, practicums, laboratories and overview activities and used in the evaluation of their learning. Dissertations and theses are covered under a separate retention schedule (see schedule 07.40).				
copy	unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹		D ²
Notes : (D = Destruction R = Retention)				
¹ Retention: Until expiry of deadline for reviewing marks (according to the internal policies of each institution). Work may subsequently be returned to students (according to institution policy) or retained for 1 year.				
² Destruction: Unclaimed work may be transferred to one of the institution's records centres specializing in the discipline concerned (for example, student work in design, film, music, theatre, etc.) to the extent that regulations provide that, upon submission, ownership resides in the institution and is deemed to give the institution authorization to use or publish, for pedagogical, non-commercial purposes, work of all types submitted to professors.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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07 – TEACHING / STUDENT EVALUATION				
07.39	Dissertations and theses - Electronic records			
Data used in supervising the submission, evaluation and cataloguing of master’s theses and doctoral dissertations: student name, file number, thesis or dissertation number and title, thesis committee, research field, date of deposit, etc.				
copy	Unit	active	semi-active	inactive
primary [c]	unit responsible	X ¹		R
Notes : (D = Destruction R = Retention)				
1 Retention: As long as the system exists (data are updated regularly and are usually cumulative).				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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07 - TEACHING / STUDENT EVALUATION				
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07.40**Dissertations and theses**

Work done by students as part of a master's or doctoral program (copies of theses and dissertations) and, where required, forms signed by students authorizing reproduction and dissemination.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	1 year		R
secondary [a]	other units concerned	1 year		D

Notes : (**D** = Destruction **R** = Retention)

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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07 – TEACHING / STUDENT EVALUATION

07.41**Diplomas and certificates**

Records dealing with the issuing of diplomas and certificates to students who have completed their program of study: specimens of diplomas and certificates, schedules and procedures for issuing diplomas, inquiries regarding the awarding of diplomas, registers of diploma formats and signatories, unclaimed diplomas, special requests regarding diplomas (copies, translations, certifications), etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years or until replacement of records by a new version. Destruction of unclaimed diplomas after 2 years.

² Archives selection: Retention of schedules and procedures for issuing diplomas, specimens of each type of diploma or certificate (different formats or presentations). Destruction of support records (diploma orders, requests for copies, translations, certifications, etc).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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07 – TEACHING / COOPERATION - TEACHING**07.42****Cooperation - Teaching**

Records dealing with teaching cooperation and partnership activities and strategic alliances involving the institution and different public or private organizations, national and international (teaching and research organizations, private organizations and corporations, etc): correspondence, agreements, memoranda, protocols and other documents relating to proposed affiliations, extension programs, cooperative teaching, jointly managed programs, etc.

Copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years after termination of cooperation agreement.

² Archives selection: Retention of significant records documenting the nature, objectives, and results of cooperative teaching agreements involving the institution.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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**07 – TEACHING / COOPERATION – TEACHING****07.43****Cooperating organizations - Teaching**

Records documenting exchanges and relations maintained with various cooperating organizations with an interest in the institution's teaching: correspondence, cooperative programs, framework agreements, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years or until expiry of the cooperation agreement.

² Archives selection: Retention of framework agreements and significant correspondence documenting the nature of the relations maintained by the institution with the various cooperating organizations.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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07 – TEACHING / COOPERATION – TEACHING

07.44

Participating professors - Teaching

Records documenting the profiles and achievements of professors participating in cooperative teaching activities involving the institution: formal record of participation in cooperative projects, reports, correspondence and any other records containing the names of co-operating organizations, departments, project titles, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ³		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after departure of the participating professor.

² Archives selection: Retention of dossiers of participating professors born in the years 01 and 06 of each decade and selection of dossiers of participating professors especially distinguished in their fields.

³ Retention: 1 year after departure of participating professors.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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08 – RESEARCH AND DEVELOPMENT

08 - RESEARCH AND DEVELOPMENT / RESEARCH AND DEVELOPMENT ORGANIZATION AND MANAGEMENT				
<u>08.01</u>	Research and development administration - Electronic records			
Data used in creating and updating inventories of the institution's research projects: SIRU [Quebec Ministry of Education's Système d'information sur la recherche universitaire] files, etc.				
copy	unit	Active	semi-active	inactive
primary [c]	unit responsible	2 years		D ¹
Notes : (D = Destruction R = Retention)				
¹ Destruction: Research value ensured by retention of the following records on paper: research inventories, studies documenting the organization and development of research and development (schedule 08.02).				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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08 - RESEARCH AND DEVELOPMENT / RESEARCH AND DEVELOPMENT ORGANIZATION AND MANAGEMENT				
08.02	Research and development administration			
Records dealing with the organization and management of the institution's research and development activities: research inventories, research development and funding studies, etc.				
copy	unit	Active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ¹		D
Notes : (D = Destruction R = Retention)				
¹ Retention: 2 years or until replacement of records by a new version.				
² Archives selection: Retention of research inventories and studies substantively documenting the organization and development of the institution's research and development activities. Destruction of working records.				

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other
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08 - RESEARCH AND DEVELOPMENT / RESEARCH AND DEVELOPMENT ORGANIZATION AND MANAGEMENT				
08.03	Ethical codes and reviews			
Records dealing with codes of ethics and ethical standards to be respected in the execution of research projects, especially where research involves experimentation on human or animal subjects: comments and recommendations concerning ethical standards in specific research projects, consent forms to be filled out by participants, statements of ethical standards for funding organizations, etc.				
copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ¹		D
Notes : (D = Destruction R = Retention)				
1 Retention: 2 years after completion of research project or, in the case of general policies or standards, until replacement of records by a new version.				
2 Archives selection: Retention of codes of ethics and general ethics policies pertaining to the institution's research community as a whole. Destruction of project files and support records.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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08 - RESEARCH AND DEVELOPMENT / RESEARCH AND DEVELOPMENT FUNDING				
08.04		Research and development funding - Electronic records		
Data used in the general management of research funds: data pertaining to grant applications, grants awarded, research fields, funding organizations, etc.				
copy	unit	active	semi-active	inactive
primary [c]	unit responsible	X ¹	5 years	D ²
Notes : (D = Destruction R = Retention)				
1 Retention: 2 years after end of grant.				
2 Destruction: Research value ensured by retention of reports summarizing grants awarded to the institution (see schedule 08.07).				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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08 - RESEARCH AND DEVELOPMENT / RESEARCH AND DEVELOPMENT FUNDING				
08.05		In-house research and development funding programs		
Records dealing with internal research monies, grant sources and sponsorships to which researchers can apply for funding.				
copy	unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	R
secondary [a]	other units concerned	2 years		D
Notes : (D = Destruction R = Retention)				
1 Archives selection: Retention of records documenting the nature, resources and use of in-house research and development funding programs.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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08 - RESEARCH AND DEVELOPMENT / RESEARCH AND DEVELOPMENT FUNDING				
<u>08.06</u>	External research and development funding programs			
Records dealing with external funding programs, grant sources and sponsorships to which researchers can apply for funding.				
copy	unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	D
secondary [a]	other units concerned	2 years		D
Notes : (D = Destruction R = Retention)				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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08 - RESEARCH AND DEVELOPMENT / RESEARCH AND DEVELOPMENT FUNDING	
08.07	Research grant applications: Projects approved

Records dealing with grant applications (subject, objectives, schedules, etc.), use of funds allocated and results of the research projects funded: projects submitted, research contracts and sponsorships, correspondence, administrative forms pertaining to applications for and use of grants, evaluations, follow-ups, financial reports, etc. Records dealing with financial management of grants (budget accounts, grant cheques, etc.) are covered under a separate retention schedule (see schedule 03.13).

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after completion of research project.

² Archives selection: Retention of records produced as part of grant application process, financial reports and final activities. Destruction of support records.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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08 - RESEARCH AND DEVELOPMENT / RESEARCH AND DEVELOPMENT FUNDING

08.08

Research grant applications: Rejected projects

Records dealing with unsuccessful applications for funding (including research contracts and sponsorships): grant applications, correspondence, etc.

copy	unit	active	Semi-active	inactive
primary [a]	unit responsible	3 years		R ¹
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retention of lists of unsuccessful grant applications, if available. Destruction of files dealing with rejected applications.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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08 - RESEARCH AND DEVELOPMENT / RESEARCH AND DEVELOPMENT FUNDING

08.09

Organizations concerned with research and development

Records dealing with funding and non-funding organizations (government or private organizations): documentation, lists of applications, correspondence, forms, guidelines, etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	D
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years or until replacement of records by a new version (forms, guidelines, etc).

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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08 - RESEARCH AND DEVELOPMENT / IN-HOUSE RESEARCH

08.10

Research centres, laboratories and groups

Records dealing with the accreditation process, set-up and activities of the institution's research centres, laboratories, groups or institutes: accreditation criteria, records connected with the mission, composition, structure, organization, internal management and development of a research unit, correspondence, studies, reports , etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after the creation of the research centre, laboratory or group, or as long as the records are used in the organization and management of the unit and the pursuit of its objectives.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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08 - RESEARCH AND DEVELOPMENT / IN-HOUSE RESEARCH

08.11

Chairs

Records dealing with the accreditation, setting up and achievements of the institution's chairs: accreditation criteria, letters patent, records connected with the mission, composition, structure, organization, internal management and development of chairs, correspondence, studies, reports, etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after the creation of a chair or as long as the records are used in the process of establishing a chair and the pursuit of its objectives.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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08 - RESEARCH AND DEVELOPMENT / IN-HOUSE RESEARCH

08.12

Research and development projects - Electronic records

Data on the nature of research projects, provisions of research contracts and sponsorships, financial resources allocated, project directors, activity schedules, etc.

copy	unit	Active	semi-active	inactive
primary [c]	unit responsible	3 years		R

Notes : (D = Destruction R = Retention)

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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08 - RESEARCH AND DEVELOPMENT / IN-HOUSE RESEARCH

08.13

Research and development projects

All records dealing with the management of the institution's various research projects: documents exchanged with funding organizations, documentation on grant programs, research projects, minutes of research committee meetings, schedules, etc.

copy	unit	Active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years after conclusion of research project.

² Archives selection: Retention of research contracts and protocols as well as final reports. Destruction of support records (correspondence, financial records, forms, etc.).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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08 - RESEARCH AND DEVELOPMENT / IN-HOUSE RESEARCH

08.14

Research files

Working records used in research projects carried out under the authority of a research unit recognized by the institution: documentation, research proposals, notes, calculations, files of individual participants in research projects involving human beings, analytical reports, statistical findings, surveys and questionnaires, investigative reports, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	X ²	D ³
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years after conclusion of research project.

² Retention: 5 years (or as long as prescribed by the contractual requirements of the funding organizations and partners) for records that can be used to validate the methodology, authenticate the process and demonstrate respect for the research protocol and could be used in subsequent research projects. Relevance of retention should be reviewed every 5 years.

³ Destruction: Research value ensured by retention of research project final reports (see schedule [08.13](#)).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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08 – RESEARCH AND DEVELOPMENT / IN-HOUSE RESEARCH

08.15

Use of laboratory animals and biological material - Electronic records

Data used in the management of the institution's research protocols: orders for laboratory animals, equipment and biological material, supplier relations, research clients and associates, inventories, etc.

copy	unit	active	semi-active	inactive
primary [c]	unit responsible	2 years		D ¹

Notes : (**D** = Destruction **R** = Retention)

¹ Destruction: Research value ensured by retention of paper records documenting protocols for use of laboratory animals (schedule [08.16](#)).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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08 – RESEARCH AND DEVELOPMENT / IN-HOUSE RESEARCH

[08.16](#)

Use of laboratory animals and biological material

Records dealing with the management of protocols for use of laboratory animals, equipment and biological material by the institution's researchers: user files, authorization requests, price registers, procedures for and files on animal maintenance, care and treatment, drug and barbiturate use registers, etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years. Records concerned with specific laboratory animals are retained for 2 years after the death of the animal or its departure from the institution's laboratories.

² Archives selection: Retention of laboratory animal use protocols. Destruction of other records.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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08 - RESEARCH AND DEVELOPMENT / RESEARCHERS

[08.17](#)

Researchers - Electronic records

Data used in ensuring the registration and updating of directories of the institution's researchers: civil data, status, etc.

copy	unit	Active	semi-active	inactive
primary [c]	unit responsible	2 years	X ¹	D ²
Notes : (D = Destruction R = Retention) ¹ Retention: 10 years after the conclusion of the last research project carried out. ² Destruction: Research value ensured by retention of the following paper records: research inventories (see schedule 08.02), research contracts and reports (see schedule 08.13), researchers' files (see schedule 08.18).				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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08 - RESEARCH AND DEVELOPMENT / RESEARCHERS				
08.18	Researchers			
Records relating to research profiles and achievements of professor-researchers: grant applications, reports, correspondence and all other records providing in particular, the names of funding organizations, departments, project titles, grant amounts awarded, number of grants, etc.				
copy	unit	Active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ³		D
Notes : (D = Destruction R = Retention)				
1 Retention: 2 years after departure of researcher.				
2 Archives selection: Retention of files of researchers born in the years 01 and 06 of each decade and files of researchers particularly noted in their field of research.				
3 Retention: 1 year after departure of researcher.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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08 - RESEARCH AND DEVELOPMENT / COOPERATION - RESEARCH AND DEVELOPMENT				
08.19		Cooperation and partnership - Research and development		
Records dealing with research cooperation and partnership activities and strategic alliances involving the institution and different public or private organizations, national and international (teaching and research organizations, private organizations and corporations, etc): correspondence, agreements, memoranda, protocols and other documents, etc.				
copy	Unit	Active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)	
¹ Retention: 2 years after the end of the cooperation agreement. ² Archives selection: Retention of significant records documenting the nature, objectives and results of research cooperation agreements involving the institution.	
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other	
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08 - RESEARCH AND DEVELOPMENT / COOPERATION - RESEARCH AND DEVELOPMENT				
<u>08.20</u>	Cooperating and partnership organizations – Research and development			
Records documenting exchanges and relations maintained with various cooperating organizations with an interest in the institution's research: correspondence, cooperative programs, framework agreements, etc.				
copy	unit	Active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ¹		D
Notes : (D = Destruction R = Retention)				
¹ Retention: 2 years or until expiry of cooperation master agreement.				
² Archives selection: Retention of framework agreements and significant correspondence documenting the nature of the relations maintained by the institution with the various cooperating organizations.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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08 - RESEARCH AND DEVELOPMENT / COOPERATION - RESEARCH AND DEVELOPMENT				
08.21	Participating professors – Research and development			
Records documenting the research profiles and achievements of professor-researchers: formal record of participation in cooperative projects, reports, correspondence and any other records containing the names of cooperating organizations, departments, project titles, etc, etc.				
copy	unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ³		D
Notes : (D = Destruction R = Retention)				
¹ Retention: 2 years after departure of the participating professor.				
² Archives selection: Retention of dossiers of participating professors born in the years 01 and 06 of each decade and selection of dossiers of participating professors especially distinguished in their fields.				
³ Retention: 1 year after departure of participating professors.				

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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End of Category: 08 - Research and Development



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[04 - Real and Movable Property](#) | [05 - Students Affairs](#) | [06 - Community Services](#) |
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Records Retention Schedules for
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[07 - Teaching](#) | [08 - Research and Development](#) | **09 - Information and Communications**

09 – INFORMATION AND COMMUNICATIONS

09 - INFORMATION AND COMMUNICATIONS / COMMUNICATIONS

[09.01](#)

Institutional identification

Records dealing with the definition, design and modification of all forms of the official corporate identification that represents the institution and its various components: logos and depictions of the institution's name (signs, official stationery, vehicles, facilities, signage), coats of arms, mottos, seals, colours, flags, songs, emblems, etc.

copy	Unit	active	semi-active	inactive
primary [e]	unit responsible	X ¹		R ²
secondary [e]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years or until replacement of records by a new version.

² Archives selection: Retention of reference records showing institution identifications and records documenting the definition and management of the application of the official identification standards for the institution and its various components.

[] = medium ---> a = paper b = microfilm c = computer d = audio-visual e = other

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09 – INFORMATION AND COMMUNICATIONS / COMMUNICATIONS

[09.02](#)

Official ceremonies and special events

Records dealing with ceremonies, celebrations, inaugurations, visits, special days, anniversaries, receptions, events, parties, launches, openings and other special events organized by the institution and its various components: invitation and attendance lists, invitation cards, publicity, posters, folders, documentation, press clippings, photographs, texts of speeches, other notes (protocols, proceedings, security, banquets), etc.

copy	unit	Active	semi-active	Inactive
primary [e]	unit responsible	X ¹	3 years	R ²
secondary [e]	other units concerned	X ¹		D
Notes : (D = Destruction R = Retention) ¹ Retention: 2 years after holding the event. ² Archives selection: Retention of press releases, programs of activities, visitor registers, lists of invitees and attendees, photographs, speeches, significant written materials, specimen invitations and promotional documents (folders, posters, etc.) associated with major events organized by the institution or one of its components. Destruction of support records used in organizing events (reservation forms, publicity requisitions, security measures, etc.).				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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09 - INFORMATION AND COMMUNICATIONS / COMMUNICATIONS				
09.03	Distinguished guest books			
Guest books documenting the proceedings of official ceremonies or special events and containing the signatures of distinguished visitors received or honoured by the institution or one of its components.				
Copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹		R
Notes : (D = Destruction R = Retention)				
1 Retention: Until the register is full.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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09 - INFORMATION AND COMMUNICATIONS / COMMUNICATIONS	
09.04	Conferences, addresses, speeches

Records dealing with talks, speeches, conferences, presentations and other statements (communications) made by members of the institution or by outside public figures invited to speak in the course of activities organized by the institution.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	1 year		D

Notes : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of texts of speeches given in the course of the institution's activities or outside the institution by its members as part of their duties (representing the institution). Retention of speeches given by outside public figures dealing with subjects related to the activities of the institution or one of its components. Destruction of texts of speeches not dealing with the institution's activities.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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09 - INFORMATION AND COMMUNICATIONS / INFORMATION

09.05

Internal information

Records dealing with the execution, development and follow-up of internal information programs, the design, drafting, publication and dissemination of information and communication documents intended for all employees of the institution or one of its components: newspapers, newsletters and bulletins, announcements and releases, texts of speeches and addresses, etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	2years	3 years	R ¹
secondary [a]	other units concerned	1 years		D

Notes : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of internal information policies and official records disseminated by the institution or one of its components. Destruction of working records.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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09 – INFORMATION AND COMMUNICATIONS / INFORMATION

09.06	Publicity and marketing			
Records dealing with communication strategies, publicity campaigns, sponsorships and marketing activities to promote the institution’s activities and products: folders and brochures, posters, advertising inserts, publicity disseminated in the print media (newspapers, magazines), the electronic media (radio, television, Internet) or posted in public places (notices, posters, displays, etc.).				
copy	Unit	active	semi-active	inactive
primary [e]	unit responsible	X ¹	3 years	R ²
secondary [e]	other units concerned	X ¹		D
Notes : (D = Destruction R = Retention)				
1 Retention: 2 years or until replacement of records by a new version. 2 Archives selection: Retention of communication strategies, promotional documents (brochures, posters, sound and video recordings, the contents of promotional ads disseminated over the Internet, etc.), programs, records and reports of promotional activities and publicity campaigns (statistics, outcomes evaluations, impact analyses). Destruction of support and working records.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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09 – INFORMATION AND COMMUNICATIONS / INFORMATION				
09.07		Media relations		
Records produced by various written and electronic media on the institution’s activities (press clippings, reviews). This schedule also covers records generated by the institution to inform the media of major events and important activities or any other information intended for the general public (press releases, press conferences).				
copy	unit	active	Semi-active	inactive
primary [e]	unit responsible	2 years		R ¹
secondary [e]	other units concerned	1 year		D
Notes : (D = Destruction R = Retention)				
¹ Archives selection: Retention of press releases, press clippings and reviews dealing directly or indirectly with the institution, specimens of press conference invitations and complete media information kits (press releases, information and promotional documents, photographs, etc.).				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
PREVIOUS SCHEDULE NEXT SCHEDULE				
Updated: 14/3/02				



09 – INFORMATION AND COMMUNICATIONS / INFORMATION**09.08****Publications - Electronic records**

Data used in the layout, editing and printing of the various publications of the institution or one of its components: books, reviews, magazines, journals, etc.

copy	unit	active	Semi-active	inactive
primary [c]	unit responsible	X ¹	X ²	D ³
secondary [c]	other units concerned	X ⁴		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 1 year after publication of documents.

² Retention: Until the next updating of records (re-evaluation after 5 years).

³ Destruction: Research value ensured by retention of paper publications (schedules [09.09](#) and [09.10](#)).

⁴ Retention: Until publication has been finalized.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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**09 - INFORMATION AND COMMUNICATIONS / INFORMATION****09.09****Administrative publications**

Records dealing with the preparation, production and distribution of the administrative publications of the institution or one of its components (books, reviews and periodicals, notices, reports, brochures, bulletins, newsletters, academic calendars, etc.): manuscripts and working texts, files of publishing projects accepted or rejected (correspondence, forms, grant applications, submissions, publicity, etc.), financial records associated with the production and promotion of publications, published texts. Learned or scientific publications are covered by a separate retention schedule (see schedule [09.10](#)).

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years after publication of document or text.

² Archives selection: Retention of one copy of all publications of an administrative nature issued by the institution or one of its components, lists of publications and of rejected publishing proposals. Destruction of working and support records from the production and distribution of administrative publications.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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09 - INFORMATION AND COMMUNICATIONS / INFORMATION

09.10

Learned or scientific publications

Records dealing with the preparation, production and dissemination of learned or scientific publications involving the institution, one of its components or one of its members (books, journals, etc.): manuscripts and working texts, files of publishing projects accepted or rejected (correspondence, forms, grant applications, submissions, publicity, etc.), financial records associated with the production and promotion of texts, published material. Publications of an administrative nature are covered by a separate retention schedule (see schedule [09.09](#)).

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes :

(D = Destruction R = Retention)

¹ Retention: 2 years after publication of document or text.

² Archives selection: Retention of one copy of all printed and published material involving the institution or one of its components (depending on the internal policies of each institution) and lists of learned or scientific publications. Destruction of working and support records generated in the production and dissemination of learned or scientific publications.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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09 – INFORMATION AND COMMUNICATIONS / INFORMATION

09.11

Mail, express, transport

Records dealing with the management of the institution's internal and external mail delivery systems as well as the transport and delivery of goods and packages: delivery orders, franking rights, postage meter reports, letter and parcel despatch by outside companies, customs declarations and despatch notices (Canada Post), registration receipts, bills of lading, notices to carriers concerning customs parcel inspections, delivery logs (express), etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	3 years		D
secondary [a]	other units concerned	1 year		D

Notes :

(D = Destruction R = Retention)

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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09 – INFORMATION AND COMMUNICATIONS / INFORMATION

09.12

Reprography

Records dealing with the management of the institution's reprographic services: photocopy requisitions, internal printing requisitions, internal and external invoicing and billing, management of use and money collection from coin-operated photocopiers, servicing reports, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	4 years	D
secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years (non-financial records such as requisitions for photocopying and printing work should be destroyed after 2 years).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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09 - INFORMATION AND COMMUNICATIONS / TELECOMMUNICATIONS

09.13

Telecommunications – Electronic records

Data used in the management of the institution's telecommunications systems: records concerning the installation and set-up of telecommunications infrastructure, telecommunications equipment and installations inventories, lists of accounts, invoicing and billing, user lists for telephone, e-mail, voice mail and fax systems and services, etc.

copy	unit	active	Semi-active	inactive
primary [c]	unit responsible	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: As long as the equipment is in service and client account is active.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other



09 - INFORMATION AND COMMUNICATIONS / TELECOMMUNICATIONS

09.14

Telecommunications

Records dealing with the management of the institution's telecommunications systems: needs analyses, acquisitions, infrastructure installations, use and management of equipment and telephone lines, lists of accounts, invoicing and billing, long-distance controls, user lists for telephone, e-mail, voice mail and fax systems and services, etc.

copy	unit	active	Semi-active	inactive
primary [a]	unit responsible	2 years	5 years	D
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other



09 - INFORMATION AND COMMUNICATIONS / TELECOMMUNICATIONS

09.15

E-mail – Electronic records

E-mail messages sent or received by members of the institution: liaison records, notices of meetings, various memos and correspondence. This schedule does not cover electronic files attached to e-mail messages, which are covered by separate retention schedules according to the nature of the records concerned.

copy	Unit	active	semi-active	inactive
primary [c]	unit responsible	X ¹		D ²
secondary [c]	other units concerned	X ¹		D

Notes :		(D = Destruction R = Retention)
¹ Hard copies of e-mails documenting and substantiating major transactions, decisions or exchanges of information (opinions, comments, positions) or which could be associated with other paper records should be printed immediately upon creation or receipt, and placed in the appropriate file. Other e-mails should be destroyed immediately after sending or use. ² Destruction: Research value ensured by retention of paper records.		
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other		
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09 - INFORMATION AND COMMUNICATIONS / TELECOMMUNICATIONS				
<u>09.16</u>	Voice Mail			
Telephone messages recorded and received in the institution’s users’ voice mailboxes.				
copy	Unit	active	semi-active	inactive
primary [c]	unit responsible	X ¹		D
Notes :		(D = Destruction R = Retention)		
1 Messages are erased automatically after a period fixed by the institution.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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09 – INFORMATION AND COMMUNICATIONS / ARCHIVES, LIBRARY, AND MUSEUM HOLDINGS				
09.17	Archives, library, and museum holdings - Electronic records			
Data used in the management of the institution’s archives, library, and museum holdings (books, periodicals and journals, brochures, rare books, archival fonds, audio-visual records, works of art, scientific collections, etc.): acquisitions, registrations, evaluations, storage, processing and treatment, descriptions, retrievals, loans, exhibitions, reservations, consultations and preservation.				
copy	Unit	active	semi-active	inactive
primary [c]	unit responsible	X ¹		D ²

Notes :(**D** = Destruction **R** = Retention)

¹ Retention: As long as holdings are retained by the institution (reference files), as long as users have borrowing rights (client files) or until the documents or museum pieces are returned (loan files).

² Destruction: Research value ensured by retention of the following paper records: evaluation, reference and acquisition files (schedule [09.18](#)), processing and treatment files of archival fonds and museum pieces (schedule [09.19](#)), catalogues, inventories and research aids (schedule [09.20](#)).

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[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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**09 – INFORMATION AND COMMUNICATIONS /
ARCHIVES, LIBRARY, AND MUSEUM HOLDINGS****[09.18](#)****Acquisition of archives, library, and museum holdings**

Records dealing with the acquisition process of the institution's archives, library, and museum holdings (books, journals and periodicals, brochures, rare books, archival fonds, audio-visual records, works of art, scientific collections, etc.): acquisition, evaluation and reference files, purchase requisitions, purchase orders, invoices, correspondence with suppliers, subscription renewals, etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	X ²	R ³
secondary [a]	other units concerned	1 year		D

Notes :(**D** = Destruction **R** = Retention)

¹ Retention: 2 years after acquisition or end of subscription (books, periodicals and journals, databanks) or as long as holdings are retained by the institution (archival fonds, rare books, museum collections, etc.).

² Retention: 5 years for support records.

³ Archives selection: Retention of evaluation, acquisition and reference files associated with the institution's archival fonds, rare books and museum collections. Destruction of support records.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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**09 - INFORMATION AND COMMUNICATIONS /
ARCHIVES, LIBRARY, AND MUSEUM HOLDINGS****[09.19](#)****Treatment of archives, library, and museum holdings**

Records dealing with the management of the processing and treatment of the institution's archives, library, and museum holdings (books, journals and periodicals, brochures, rare books, archival fonds, audio-visual records, works of art, scientific collections, etc.): treatment standards and procedures, treatment files (description, physical preparation, bookbinding, restoration), lists (documents or pieces to be or being treated), cataloguing worksheets, treatment statistics, etc.

copy	unit	active	semi-active	inactive
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primary [a]	unit responsible	2 years		R ¹
Notes : (D = Destruction R = Retention)				
¹ Archives selection: Retention of files documenting the treatment of the institution's archival fonds, rare books and museum holdings.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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09 - INFORMATION AND COMMUNICATIONS / ARCHIVES, LIBRARY, AND MUSEUM HOLDINGS				
09.20	Dissemination and use of archives, library, and museum holdings			
Records dealing with the management of the dissemination and use of the institution’s archives, library, and museum holdings (books, journals and periodicals, brochures, rare books, archival fonds, audio-visual records, works of art, scientific collections, etc.): consultation requests, loans, client files, exhibitions, control of documents and objects returned late or not returned, holds, inter-library loans, catalogues, inventories, search tools, statistics on consultation or use, management of material reserved by the teaching staff, etc. Files dealing with the organization of exhibitions are covered by a separate retention schedule (see schedule 06.15).				
copy	unit	active	semi-active	Inactive
primary [a]	unit responsible	X ¹		R ²
secondary [a]	other units concerned	X ¹		D
Notes : (D = Destruction R = Retention)				
¹ Retention: 3 years or until replacement of records by a new version.				
² Archives selection: Retention of catalogues, inventories and search tools published or printed for the purpose of distribution. Retention of loan contracts for archival or museum pieces for exhibition purposes as well as cumulative use statistics. Destruction of support records.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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09 - INFORMATION AND COMMUNICATIONS / ARCHIVES, LIBRARY, AND MUSEUM HOLDINGS	
09.21	Archives, library, and museum holdings – Users
Records dealing with the user fees applied and services rendered to the users of the institution's archives, library, and museum holdings: requests for documentary databank access codes, special privileges, allocation and booking of work or consultation rooms, document reproduction services, needs assessments, etc.	

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	2 years		R ¹
secondary [a]	other units concerned	1 year		D
Notes : (D = Destruction R = Retention)				
¹ Archives selection: Retention of reports and statistics documenting visit or user activities of the archives, library, and museum holdings.				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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09 - INFORMATION AND COMMUNICATIONS / AUDIO-VISUAL AND COMPUTER				
09.22	Audio-visual and photographic equipment – Electronic records			
Data used in the management of the institution’s audio-visual and photographic materials and equipment: inventories, purchases, recordings, distribution, loans, reservations, maintenance, repairs, etc.				
copy	unit	active	semi-active	Inactive
primary [c]	unit responsible	X ¹		D
Notes : (D = Destruction R = Retention)				
¹ Retention: 2 years (loans, reservations and distribution) or as long as the equipment is kept by the institution (purchases, maintenance and repairs).				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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09 - INFORMATION AND COMMUNICATIONS / AUDIO-VISUAL AND COMPUTER	
09.23	Audio-visual and photographic equipment

Records dealing with the management of the institution's audio-visual and photographic materials and equipment: inventories, purchase requisitions, registration forms, distribution lists, loan, reservation and maintenance forms, technical problems, repairs, equipment disappearance reports, etc.

copy	unit	Active	semi-active	inactive
primary [a]	unit responsible	X ¹		D
Notes : (D = Destruction R = Retention)				
¹ Retention: 3 years (distribution, installations, loans and reservations) or as long as the equipment is in the institution's possession (purchases, maintenance and repairs).				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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09 - INFORMATION AND COMMUNICATIONS / AUDIO-VISUAL AND COMPUTER				
09.24	Audio-visual and photographic productions – Electronic records			
Data used in inventory control of the institution’s audio-visual and photographic productions, as well as regular production requests.				
copy	unit	active	semi-active	Inactive
primary [c]	unit responsible	X ¹		D ²
Notes : (D = Destruction R = Retention)				
¹ Retention: 2 years after completion of project (control of production requests) or as long as the system exists (production inventories).				
² Destruction: Research value ensured by retention of search tools describing the institution’s audio-visual and photographic archives (schedule 09.20).				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
PREVIOUS SCHEDULE NEXT SCHEDULE				
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09 - INFORMATION AND COMMUNICATIONS / AUDIO-VISUAL AND COMPUTER	
09.25	Audio-visual and photographic productions

Records dealing with the design and production of audio-visual materials (sound recordings, videotapes, films etc.) and photographic materials (proofs, negatives, slides, etc.), with the management of outside productions in this field as well as with various technical services available to institution members and outside clients: technical files, budgets, audio-visual and photographic productions produced by the institution concerning its activities.

copy	unit	Active	semi-active	inactive
primary [d]	unit responsible	2 years	3 years	R ¹
secondary [d]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

¹ Archives selection: Selection of records according to the importance of the subjects dealt with (in relation to the activities and achievements of the institution or one of its components), the nature of the records as well as the technical quality of the productions. Retention of records supplying significant information on the nature, contents (date, event, persons photographed or involved, etc.) and production process (contract, copyright permission, scenario, etc.).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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09 - INFORMATION AND COMMUNICATIONS / AUDIO-VISUAL AND COMPUTER

09.26

Audio-visual and photographic resources - Users

Records dealing with privileges granted and services provided to the users of the institution's audio-visual and photographic resources: special privileges, specific services, needs evaluations, etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	2 years		R ¹
secondary [a]	other units concerned	1 year		D

Notes : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of reports and statistics documenting audio-visual and photographic resources visit and user activities.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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09 - INFORMATION AND COMMUNICATIONS / AUDIO-VISUAL AND COMPUTER**09.27****Computer equipment – Electronic records**

Data used in the management of the institution's computer materials and equipment: inventories, purchases, registrations, distribution, loans, reservations, maintenance, repairs, etc.

copy	Unit	active	semi-active	inactive
primary [c]	unit responsible	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years (loans, reservations and distribution) or as long as the equipment is owned by the institution (purchases, maintenance and repairs).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

PREVIOUS SCHEDULE | NEXT SCHEDULE

Updated: 14/3/02

**09 - INFORMATION AND COMMUNICATIONS / AUDIO-VISUAL AND COMPUTER****09.28****Computer equipment**

Records dealing with the management of the institution's computer materials and equipment: inventories, purchase requisitions, registration forms, distribution lists, loan, reservation and maintenance forms, technical problems, repairs, equipment disappearance reports, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 3 years (distribution, installations, loans and reservations) or as long as the equipment is kept by the institution (purchases, maintenance, repairs).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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09 - INFORMATION AND COMMUNICATIONS / AUDIO-VISUAL AND COMPUTER**09.29****Software – Electronic records**

Data used in the operation and management of the institution's computer systems: data dictionaries, programs created by the institution, programs purchased, software, package and program inventories, etc.

copy	unit	active	semi-active	inactive
primary [c]	unit responsible	X ¹	X ²	D ³

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 3 years or as long as the software or computer program is in use.

² Retention: As long as the data can be used, should remain accessible or are to be transferred to a new computer program.

³ Destruction: Research value ensured by retention of records dealing with institutional software, packages or programs developed by the institution (schedule [09.30](#)).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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**09 - INFORMATION AND COMMUNICATIONS / AUDIO-VISUAL AND COMPUTER****09.30****Software**

Records dealing with the computer software, packages and programs used in the operation and management of the institution's computer systems: purchase, loan and rental files, data dictionaries, programs created by the institution, programs purchased, systems documentation, computer software, package and program inventories, etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	X ²	D ³

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: As long as the software package or program is in use. Records dealing with computer software, package or program loans should be destroyed 1 year after closing the file.

² Retention: As long as the data can be used, should remain accessible or are to be transferred to a new computer program.

³ Archives selection: Retention of records dealing with institutional software packages or programs developed by the institution.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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09 - INFORMATION AND COMMUNICATIONS / AUDIO-VISUAL AND COMPUTER**09.31****Computers systems – Electronic records**

Data used in the management and operation of the institution's computer systems: inventories and descriptions of computer systems, computer project requests, authorizations to use computer resources, valid code files, computer file inventories, tape and cassette inventories, user access codes, etc.

copy	unit	active	Semi-active	inactive
primary [c]	unit responsible	X ¹		D ²

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: As long as system exists or client account is active.

² Destruction: Research value ensured by retention of the following paper records: computer systems development files (project descriptions, documentation, applicants, costs) and use statistics (schedule [09.32](#)), annual reports of units responsible for the institution's various computer systems (schedule [01.27](#)).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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**09 - INFORMATION AND COMMUNICATIONS / AUDIO-VISUAL AND COMPUTER****09.32****Computer systems**

Records dealing with the management and operation of the institution's computer systems: computer systems inventories and descriptions, computer project requests, systems development and maintenance files, computer resources user authorizations, valid code files, computer file inventories, tape and cassette inventories, user access codes, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹		R ²

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 3 years or as long as system exists or client account is active. Support records should be destroyed 2 years after closing of file (in-house development requests that are not approved, systems use forms, production requests, etc.).

² Archives selection: Retention of computer systems development files (project descriptions, documentation, applicants, costs) and use statistics.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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09 - INFORMATION AND COMMUNICATIONS / AUDIO-VISUAL AND COMPUTER				
09.33	Web sites – Electronic records			
Data supplied by the institution or one of its components and accessible over the Internet, to authorized clients (internal or external) or to anyone with Internet access, as applicable, providing information on the institution’s operations, structures, resources, services, etc. This information also enables users to obtain information or services, perform certain transactions and communicate directly with the institution’s various units and resource persons by e-mail.				
copy	unit	Active	semi-active	inactive
primary [c]	unit responsible	X ¹		R ²
N o t e s : (D = Destruction R = Retention)				
1 Retention of information until withdrawal or replacement by a new version. 2 Retention of an annual profile of the Web site. Important records included as different Web site pages should be covered under separate retention schedules (each unit responsible for a Web site is responsible for the application of this schedule and for all schedules intended to ensure the preservation of information or records collected, transmitted or exchanged through its Web site..				
[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other				
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09 – INFORMATION AND COMMUNICATIONS / AUDIO-VISUAL AND COMPUTER				
09.34		Web sites		
Records dealing with the creation, updating and development of the Web sites of the institution or one of its components: site creation files (presentation pages, menus, information texts, pictures, audio-visual elements embedded in the Web site, lists of hyperlinks), updating and development records, comments received, lists of the institution's Web sites, etc.				
copy	unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹		R ²
Notes : (D = Destruction R = Retention)				
1 Retention: As long as the Web site exists. Support records (especially former versions of different information sections) should be destroyed after 3 years.				
2 Archives selection: Retention of lists of the institution's Web sites. Retention of records representative of the creation and development of the Web site's structure and major elements. Important records included in the site's various pages should be covered under separate retention schedules (each unit responsible for a Web site is responsible for applying this schedule and all retention schedules intended to ensure the preservation of information or records collected, transmitted or exchanged through its Web site).				
[] = medium --->a = paper b = microfilm c = computer d = audio-visual e = other				
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09 - INFORMATION AND COMMUNICATIONS / AUDIO-VISUAL AND COMPUTER

09.35

Computer resources – Users

Records dealing with user rights granted and services provided to users of the institution's computer resources: requests for computer systems access codes, special privileges, requests for specific computer applications, needs assessments, etc.

copy	Unit	Active	semi-active	inactive
primary [a]	unit responsible	3 years		D
secondary [a]	other units concerned	1 year		D

N o t e s :

(D = Destruction R = Retention)

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

01 - ADMINISTRATION / ADMINISTRATION – GENERAL

01.01

Final versions – Electronic records

Records whose final version is not subject to revision or periodic updates: reports, studies, minutes of meetings, correspondence, etc. (this schedule applies only to files whose subject is not covered by a specific retention schedule).

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹		D ²
secondary [c]	other units concerned	X ³		D

Notes : (D=Destruction R = Retention)

¹ Retention: 1 year after creation of record or until file is reused for preparing similar records.

² Destruction: Research value ensured by retention (with archives) of original records on paper or microfilm (if there is no paper or microfilm version, electronic records should be transferred to paper or microform).

³ Retention: 1 month after receipt of record.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

01 – ADMINISTRATION / ADMINISTRATION - GENERAL

01.02

Updated records – Electronic records

Records requiring foreseeable, periodic revision: procedures, policies, regulations, directives, liaison records, inventories, electronic spreadsheets, etc. (this schedule applies only to files whose contents are not covered by a specific retention schedule).

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹		D ²
secondary [c]	other units concerned	X ³		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: Until next updating of records or until a final version is produced.

² Destruction: Research value ensured by retention (with archives) of original records on paper or microfilm (if there is no paper or microfilm version, electronic records should be transferred to paper or microform).

³ Retention: 1 month following reception of record.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

01 - ADMINISTRATION / ADMINISTRATION - GENERAL

01.03

Working records

Records used in the preparation of miscellaneous reports, memoranda, studies, policies, regulations, procedures, publications, etc. (drafts, notes or preliminary data, supporting documentation).

copy	Unit	Active	Semi-active	Inactive
primary[a]	unit responsible	X ¹		D
secondary [a]	other units concerned	X ¹		D

N o t e s : (**D** = Destruction **R** = Retention)

¹ Retention: 1 year following deposit or dissemination of the record's final version.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

01 – ADMINISTRATION / ADMINISTRATION - GENERAL

01.04

Reference files

Files whose subject matter may vary from unit to unit according to need and specific activities. These files comprise the working or support records of a given unit relating to its specific activities and required for reference purposes in its operations. They may contain records of internal or external origin (magazine articles, press clippings, folders, brochures, extracts from books, reports and outside publications, catalogues, technical reference records, etc.).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		D
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: 1 year following completion of the file subject activity.

Note: Such records do not necessarily constitute archives within the meaning of the *Quebec Archives Act* R.S.Q. c.A21.1, but may be used as support records in the course of the activities of the institution or of one of its components (they should be destroyed as soon as the information contained in them is no longer useful or relevant).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

01 – ADMINISTRATION / ADMINISTRATION – GENERAL

01.05

Subject files, ad hoc files

Files dealing with a specific subject and consolidating various records relating to the activities of the institution or of one of its components: correspondence, reports, studies, statistics, discussion papers, comments, etc. (this schedule applies only to files whose contents are not covered by a specific retention schedule).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: Until the file subject activity has been completed.

² Archives selection: Retention of records that significantly document the direction and development of main activities of the institution or of one of its components.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

01 – ADMINISTRATION / ADMINISTRATION – GENERAL

01.06

Liaison files

Correspondence received or sent regarding invitations, acknowledgements, congratulations, good wishes, condolences, etc. Also includes routing slips, memoranda, acknowledgements of receipt, certified copies and all liaison records that could be part of specific administrative files.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		D
secondary [a]	other units concerned	X ²		D

Notes : (D = Destruction R = Retention)

- ¹ Retention: 3 months after sending record.
² Retention: 3 months after receiving record.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
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01 – ADMINISTRATION / ADMINISTRATION – GENERAL

01.07

Lists and inventories

Records used in ongoing management: inventories, mailing and distribution, directories, catalogues, etc. (this schedule applies only to files whose contents are not covered by a specific retention schedule).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		D ²
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: As long as the record is operative or until its replacement by a new version.

² Destruction: Inventories, lists and other similar records having research value are covered by specific retention schedules.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

01 – ADMINISTRATION / ADMINISTRATION – GENERAL

01.08

Chronological correspondence

Files, registers, or logs comprising correspondence in chronological order sent by a unit for follow-up or to document its daily activities or performance.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R ¹

Notes : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of management's chronological correspondence registers to the extent that they significantly document the evolution of activities related to the institution's mandate (if quantities justify, transfer to microfilm and destroy paper records).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

01 – ADMINISTRATION / ADMINISTRATION – GENERAL

01.09

Appointments

Lists of persons occupying management positions or who participate in the institution's various bodies, committees, boards or associations.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		R ²
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: Until replacement by a new version.

² Archives selection: Retention of an annual appointments log profile.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

01 – ADMINISTRATION / ADMINISTRATION – GENERAL

01.10

Elections

Records dealing with the organization of elections, consultations or referenda: organization of balloting, election procedures, signs and posters, lists of nominees, ballots, forms relating to vote counting, results, minutes of election committee (if applicable), correspondence, etc..

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		R ²
secondary [a]	other units concerned	X ³		D

Notes : (D = Destruction R = Retention)

¹ Retention: 1 year following confirmation of results (ballots to be destroyed immediately following expiry of deadline for challenges).

² Archives selection: For elections or consultations leading to appointments of members of the institution's management, retention of election committee minutes, list of electoral college members, returning officer's report, election procedure and significant correspondence (or equivalent in the case of a referendum). Destruction of election support records.

³ Retention: Until confirmation of results.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Quebec Academic Institutions

01 – ADMINISTRATION / ADMINISTRATION – GENERAL

01.11

Participation in outside organizations

Miscellaneous records relating to activities of external organizations that maintain relations with the institution or with one of its components (representation on committees, in joint activities, etc.). Includes correspondence, printouts, minutes and any records created or received in the course of such activities.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retention of correspondence, reports and all records documenting significant exchanges between the institution and outside organizations. Retention of records prepared and submitted by representatives of the institution, documenting its active participation or reflecting its institutional positions. Destruction of documentation or records accumulated for information purposes that do not refer to the institution's participation.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Quebec Academic Institutions

01 – ADMINISTRATION / ADMINISTRATION – GENERAL

01.12

Calendar of activities

Records that indicate, for a definite period, the date of certain activities or events connected to the life of the institution or one of its components: calendars, programs, timetables, schedules, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	X ²		D

Notes : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of calendars or programs that significantly illustrate activities directly related to the mandate of the institution or one of its components.

² Retention: Until the end of the period concerned.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

01 – ADMINISTRATION / ADMINISTRATION – GENERAL

01.13

Inquiries

Correspondence addressed to the institution by persons or outside organizations requesting general or specific information about the institution's operations or activities.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		D
secondary [a]	other units concerned	X ²		D

Notes : (D = Destruction R = Retention)

¹ Retention: 1 year after closing file.

² Retention: Until closing of file.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

01 – ADMINISTRATION / COMMITTEES

01.14 Minutes and resolutions – Electronic records

Minutes and resolutions adopted during meetings of the institution's various bodies, boards, committees or working groups (tools developed to retrieve contents of minutes and resolutions are covered by a specific schedule, see [01.31](#)).

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹		D ²
secondary [c]	other units concerned	X ³		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: Until the final version of minutes is adopted or until the files (minutes and resolutions) can be accessed directly in a computerized retrieval system.

² Destruction: Research value ensured by retention of original records on paper or microfilm (see schedule [01.15](#)).

³ Retention: Until next meeting of committee concerned.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

01 – ADMINISTRATION / COMMITTEES

01.15

Committees – General

Records documenting the functioning of meetings of the institution's various bodies, boards, committees or working groups (organization, discussions, deliberations, follow-up): schedule of meetings, notices of meetings, agendas, minutes, status reports, documents discussed, adopted or filed for information, resolutions, documentation required for meeting preparation, taking of minutes and requests for corrections.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	1 year		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 1 year after adoption of minutes.

² Archives selection: Retention of minutes and records pertaining to institution bodies and committees, as well as official copies of resolutions. Destruction of records relating to meeting preparation (proposed agenda items, notification of meeting, etc.). Destruction of records relating to ad hoc, non-statutory committees and working groups, records of whose main activities and achievements are found in the minutes, related records or other records or files of a body at a higher level.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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01 – ADMINISTRATION / COMMITTEES

01.16

Committees – Appointments

Records dealing with the appointment of members of the institution to internal or external bodies and committees (boards, commissions, committees, working groups, outside representation, etc.): correspondence, notice of expiry of term, appointment procedures, documentation on application of these procedures, appointments lists, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		R ²
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 3 years or period equivalent to length of terms, whichever is longer.

² Archives selection: Retention of cumulative list of appointments and appointment procedures. Destruction of support records.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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01 - ADMINISTRATION / HISTORICAL, CONSTITUTIVE AND REGULATORY RECORDS

01.17

Historical

Records dealing with the founding, historical evolution (growth and orientation) of the institution and its various components; and or document the history of the institution or specific events that have marked its development (historical celebrations, special anniversaries, commemorative ceremonies, unveiling of a plaque or monument, etc.). Including particular texts, manuscript notes, chronologies, publications and other records relating in whole or in part to the history of the institution, its components and its members.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retention of records that substantively document the history of the institution or one of its components.
Destruction of notes and working records.

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Records Retention Schedules for
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01 - ADMINISTRATION / HISTORICAL, CONSTITUTIVE AND REGULATORY RECORDS

01.18 Charter, statutes, letters patent

Official records providing proof of the institution's constitution (or amendments to its statutes) and set out its rights, privileges and obligations. This schedule also covers all of the amendments made to the institution's constitutive records.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		R
secondary [a]	other units concerned	X ²		D

Notes : (D = Destruction R = Retention)

¹ Transfer to archives.

² Retention: As long as the records are in effect.

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RECORDS RETENTION SCHEDULES FOR
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**01 - ADMINISTRATION /
HISTORICAL, CONSTITUTIVE AND REGULATORY RECORDS**

01.19 Regulations, by-laws

Records comprising the schedules governing the institution's organization and operations: general regulations (for the administrative and pedagogical activities of the whole institution) and specific regulations (for the activities of the various components).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		R ²
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: As long as records are in effect or until replacement by a new version.

² Archives selection: Retention of official version (and of all updates) of various regulations or by-laws.

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**01 - ADMINISTRATION /
HISTORICAL, CONSTITUTIVE AND REGULATORY RECORDS**

01.20

Honorary distinctions

Records dealing with the various distinctions conferred by the institution: honorary doctorates, medals, diplomas for artistic or scientific excellence, titles of professor emeritus, chancellor, etc. Files may contain the following records: curriculum vitae of candidates and recipients, letters of support, presentation texts, thank-you speeches, press releases, speeches by members of the institutions, invitations, correspondence, extracts of minutes of the body approving the conferring of the distinction, copies of diplomas or certificates awarded, lists of recipients, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retention of list and files of recipients (curriculum vitae, date and nature of honour conferred, field of activity, discipline), methods of conferral, records describing the procedure of awards ceremonies, lists of unsuccessful candidates, copies of certificates and degrees awarded. Destruction of unsuccessful candidates' files and non-essential support documents.

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Records Retention Schedules for
Quebec Academic Institutions

01 – ADMINISTRATION / PLANNING, ORGANIZATION AND INTERNAL GOVERNANCE

01.21 Administrative planning

Records establishing the priorities and orientations of the institution and its various components: annual, three-year and five-year corporate plans, planning of general and specific objectives for administrative units.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	R ³
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 1 year following period covered by planning document.

² Retention: 1 year or a period equivalent to the period covered by the planning document.

³ Archives selection: Retention of final versions of plans, summary records establishing specific and general objectives of the institution's units and studies completing such records. Destruction of working files.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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01 – ADMINISTRATION / PLANNING, ORGANIZATION AND INTERNAL GOVERNANCE

01.22

Policies, procedures

Internal governance records (general or specific) drawn up by the institution or one of its components with the object of guiding actions to be undertaken, providing steps to be followed, specifying means to be used to carry out activities necessary to attain the institution's goals: policies, procedures, standards, directives, administrative practices.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: As long as records are in effect or until replacement by a new version.

² Archives selection: Retention of official versions (and all updates) of policies, procedures, standards, directives and administrative practices prepared by the institution or one of its components that document the process of carrying out its various activities. Destruction of working files and extremely specific procedures.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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01 – ADMINISTRATION / PLANNING, ORGANIZATION AND INTERNAL GOVERNANCE

01.23 Delegation of authority

Records arising from the distribution and delegation of authority within the institution. This schedule also applies to financial and signing authority (certification identifying persons delegated to sign certain documents).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	D ²
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 1 year following end of the delegation.

² Destruction: Delegations approved by the institution's decision-making bodies to be kept with the records of those bodies.

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RECORDS RETENTION SCHEDULES FOR
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01 – ADMINISTRATION / PLANNING, ORGANIZATION AND INTERNAL GOVERNANCE

01.24 Administrative organization and structure

Records dealing with the definition and evolution of the mandates and administrative structure of the institution and its various components (distribution of mandates and management of organizational structure: identification of units, sub-units, functions, types and number of positions and reporting relationships). This schedule also includes reports, studies and organizational or structural analyses (re-evaluation of mandates, restructuring, creation, closing and amalgamation of administrative units, etc.).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D= Destruction R = Retention)

¹ Retention: As long as records are in effect.

² Archives selection: Retention of official versions of mandates and organizational structures and final version of analyses and reports documenting the development of administrative responsibilities, organization of the work and structure of the institution or one of its components. Destruction of drafts and organizational structures not adopted.

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Records Retention Schedules for
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01 – ADMINISTRATION / PLANNING, ORGANIZATION AND INTERNAL GOVERNANCE

01.25

Client services

Records dealing with the definition, allocation, evaluation and review of client services provided by the institution and its various components: list and description of services, definition of target clientele's needs, statistics on use of services, etc.

copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	1 year		R ²

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: Until next evaluation or redefinition of services provided by the unit.

² Archives selection: Retention of studies, reports and analyses significantly documenting services provided by the different units. Destruction of support records (drafts, preliminary versions, etc.).

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Records Retention Schedules for
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01 – ADMINISTRATION / PLANNING, ORGANIZATION AND INTERNAL GOVERNANCE

01.26

Evaluation of units

Records dealing with evaluation or organizational development activity in one of the institution's units. The file may include the following records: evaluation or action mandate and procedure, correspondence, unit self-evaluation, satisfaction survey, comparisons with other institutions, target-group consultations, and evaluation reports.

copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	X ²		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retention of summary reports and records documenting the objectives, process and results of the evaluation, consultation or action (self-evaluation reports, survey reports, client comments, final report, significant correspondence). Destruction of support records.

² Retention: Until completion of the evaluation or action.

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01 – ADMINISTRATION / REPORTS AND STATISTICS

01.27 Activity reports

Records composed of qualitative and quantitative data summarizing the activities of the institution or one of its components over a definite time period.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retention of cumulative and summary reports that document substantively the main achievements of the institution or component on an annual basis or at more frequent intervals in the absence of annual data.

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Records Retention Schedules for
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01 – ADMINISTRATION / REPORTS AND STATISTICS

01.28

Studies and analyses

Records created by the institution or one of its components summing up issues pertaining to some aspect of activities management (this schedule applies only to studies and analyses whose subject-matter is not covered by a specific retention schedule).

copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	1 year		D

Notes : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of studies and analyses bearing on subjects directly related to the mission, mandate or activities of the institution or one of its components.

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Records Retention Schedules for
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01 – ADMINISTRATION / REPORTS AND STATISTICS

01.29

Statistics

Records containing statistical data concerning various aspects of the administrative and academic management of the institution or one of its components.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	1 year		D

Notes : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of cumulative and summary statistics showing the development of the main activities of the institution or one of its components on an annual basis or a more frequent basis in the absence of annual data. Destruction of working records and or other records whose data has been used or summarized in final versions of statistical reporting.

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Records Retention Schedules for
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01 – ADMINISTRATION / REPORTS AND STATISTICS

01.30

Inquiries and surveys

Records related to the design and execution of inquiries or surveys for the institution or one of its components: correspondence, questionnaires, data interpretation reports, final reports and various other documents.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	2 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: 1 year after analysis of survey or publication of results.

² Archives selection: Retention of records relating to inquiries or surveys documenting the orientation and development of the main activities of the institution or one of its components (retention of final report and one specimen of the questionnaire used if not contained in final report). Destruction of working records (copies of questionnaires, preliminary reports etc.).

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RECORDS RETENTION SCHEDULES FOR
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01 – ADMINISTRATION / ADMINISTRATIVE RECORDS MANAGEMENT

01.31 Administrative records management – Electronic records

Data used in the management of administrative records of the institution and its components: records classification, management of essential records, minutes, forms and semi-active records, retention schedule management, inventories of microfilm or digital records, records disposal monitoring, etc..

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹		R ²

Notes : (D = Destruction R = Retention)

¹ Retention: As long as the system exists (data are updated regularly).

² Archives selection: Retention of records concerning series designated for permanent retention (archives) including but not exclusive to minutes, resolutions, microfilm or digital archives, and retired retention schedules. Records that cannot be maintained electronically should be preserved on paper or microfilm.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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01 – ADMINISTRATION / ADMINISTRATIVE RECORDS MANAGEMENT

01.32

Records classification

Records relating to the development, establishment and use of the institution's records classification system, set-up procedures, information files on status of job classifications, list of unit administrative records, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		R ²
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: As long as classification system is in effect (or entered in a filing unit) or until the replacement of a record by a new version. Destruction of working forms after use.

² Archives selection: Retention of classification plan for administrative records of the institution or one of its components (and all updates).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
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01 – ADMINISTRATION / ADMINISTRATIVE RECORDS MANAGEMENT

01.33

Essential or vital records management

Records relating to the institution's essential or vital records program including but not limited to: lists/inventories of essential/vital records, security and protective measures adopted, handling procedures, records circulation control, etc..

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		D
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: As long as essential/vital records management plan is in effect or until the replacement of a record by a new version.
Destruction of working forms after use.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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01 – ADMINISTRATION / ADMINISTRATIVE RECORDS MANAGEMENT

01.34 Management of minutes

Records relating to the institution's management of minutes: committee lists, inventories of minutes, lists of resolutions, indexing schedules, records consultation control forms, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: As long as the management program for minutes is in effect or until the replacement of a record by a new version.
Destruction of working forms after use.

² Archives selection: Retention of lists of committees and cumulative inventory of minutes.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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01 – ADMINISTRATION / ADMINISTRATIVE RECORDS MANAGEMENT

01.35 Forms management

Records relating to the program of managing the institution's forms (analysis, design, production and distribution): requests for production of forms, design and lay-out sketches(roughs), originals of masters (print-ready), orders, inventories, distribution forms, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	D
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: As long as form is in use (reprint requisitions and records can be eliminated after 2 years).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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01 – ADMINISTRATION / ADMINISTRATIVE RECORDS MANAGEMENT

01.36

Records retention and disposal schedules

Records relating to the development, set-up and use of the institution's records retention and disposal schedules: lists of inactive records, schedule development files (proposed schedules, references, documentation), approval forms, retention schedules distributed to units (general or specific).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: As long as retention schedules are in force (list of inactive records transferred to Archives).

² Archives selection: Retention of retention schedule approval forms, cumulative version of retention schedules and lists of inactive records. Destruction of working records

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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01 – ADMINISTRATION / ADMINISTRATIVE RECORDS MANAGEMENT

01.37

Semi-active records management

Records relating to the institution's semi-active records management program: lists of units, forms for the transfer, and bringing forward or final withdrawal of semi-active records.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		R ²
secondary [a]	other units concerned	X ³		D

Notes : (D = Destruction R = Retention)

¹ Retention: As long as records are kept in semi-active records depository. Forms for bringing forward records are eliminated after 1 year.

² Archives selection: Retention of transfer forms for boxes of records to be selected or preserved in toto in archives. Destruction of transfer forms for boxes of records that are destroyed , final withdrawal forms and support records.

³ Retention: As long as records are preserved in semi-active records depository.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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01 – ADMINISTRATION / ADMINISTRATIVE RECORDS MANAGEMENT

01.38

Micrographics and digitizing

Records relating to the operations of micrographics and digitizing of the institution's administrative records: project files, description of records concerned, notes, evaluation and feasibility reports, technical execution reports, designation of persons authorized to reproduce records, reproduction certificates, sworn declarations (reproduction and destruction of records), destruction notifications, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: As long as micrographics and digitizing project is operative.

² Archives selection: Retention of records certifying designations of persons authorized to reproduce records, sworn declarations, and records pertaining to the reproduction and destruction of records. Destruction of planning and project execution files.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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01 – ADMINISTRATION / ADMINISTRATIVE RECORDS MANAGEMENT

01.39

Records destruction

Records relating to the destruction process for the institution's administrative records: notifications of destruction, destruction authorization forms, forms for collection and destruction of confidential records, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	3 years		R ¹
secondary [a]	other units concerned	X ²		D

Notes : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of destruction notification and destruction authorization forms. Destruction of certificates of collection and destruction of confidential records.

² Retention: 1 year after destruction of records.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

01 – ADMINISTRATION / LEGAL AFFAIRS

01.40

Government legislation, orders and regulations

Acts, orders and regulations impacting or affecting the general operations or specific activities of the institution or one of its components.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: As long as records are operative.

² Archives selection: Retention of acts, orders and regulations specifically concerning the institution or its activities; position papers, studies, analyses and interpretations produced by the institution or one of its components on these acts and regulations. Destruction of general legislation, orders and regulations aimed at all organizations (example: *An Act respecting labour standards R.S.Q., c.N-1.1 ss 88,89 and 91*) and related documentation.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

01 – ADMINISTRATION / LEGAL AFFAIRS

01.41

Intellectual property – Electronic records

Records created and accumulated for purposes of managing and monitoring copyrights resulting from the sale or use of publications produced or acquired by the institution as well as rights related to patents, trade marks and industrial designs registered by the institution.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹		D ²

Notes : (D = Destruction R = Retention)

¹ Retention: As long as the system exists (data updated regularly).

² Destruction: Authorized where research integrity is ensured by retention of records on paper in archives (see schedules [01.42](#), [01.44](#), [01.45](#) and [01.46](#)).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

01 – ADMINISTRATION / LEGAL AFFAIRS

01.42

Copyright

Records relating to copyright for works produced or acquired by the institution. Applies equally to records containing assignments of rights, licences or authorizations relating to copyright in the institution's name for manuscripts, software, photographs and audio or video recordings.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	R ³
secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

¹ Retention: As long as assignments of rights, licences or authorizations are in effect.

² Retention: 50 years following author's death.

³ Archives selection: Retention of official records relating to copyrights of works produced or acquired by the institution. Destruction of records containing assignments of rights, licences or authorizations relating to copyright in the institution's name.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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01 – ADMINISTRATION / LEGAL AFFAIRS

01.43

Legal deposit

Records relating to the legal deposit in the National Library of Canada and the Bibliothèque nationale du Québec of documents published by the institution: correspondence, administrative forms, certificates of legal deposit. This schedule covers records relating to the legal deposit of publications, notices, brochures, maps and plans, electronic documents, audio recordings, prints, reviews, software, microforms, musical scores and journals published by the institution or one of its components.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	1 year		R ¹

Notes : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of certificates of legal deposit. Destruction of correspondence related to process of legal deposit.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

01 – ADMINISTRATION / LEGAL AFFAIRS

01.44

Patents

Records relating to patents to which the institution holds the rights. This schedule also covers records prior to application for patent.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	R ³
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: As long as the patent is in effect.

² Retention for a period of 17 years from patent date (if application was made prior to October 1, 1989).

³ Archives selection: Retention of certificate of granting of patent and records prior to application for patent. Destruction of correspondence related to the application and issuing of certificate.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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01 – ADMINISTRATION / LEGAL AFFAIRS

01.45

Trademarks

Records establishing the legal ownership of trademarks in the institution's name.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	R ³

Notes : (D = Destruction R = Retention)

¹ Retention: Until certificate of trademark registration obtained.

² Retention: 15 years following last renewal of trademark registration.

³ Archives selection: Retention of trademark certificate. Destruction of correspondence related to application for issue of certificate.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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01 – ADMINISTRATION / LEGAL AFFAIRS

01.46

Registration of industrial designs

Records establishing the legal ownership of industrial designs in the institution's name.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	R ³

Notes : (D = Destruction R = Retention)

¹ Retention: Until certificate of registration of industrial design is obtained.

² Retention: 10 years following the last renewal of industrial design registration.

³ Archives selection: Retention of industrial design certificate. Destruction of correspondence related to application and issuing of certificate.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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01 – ADMINISTRATION / LEGAL AFFAIRS

01.47

Legal opinions and advice

Records containing legal opinions and advice relating to the conduct of the institution's operations (interpretation of legislation, regulations, contracts, etc.).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary[a]	other units concerned	X ³		D

N o t e s : (D = Destruction R = Retention)

¹ Retention: Until settlement of the issue or as long as the legal advice remains in force or operative.

² Archives selection: Retention of final version of legal advice and opinions as well as the case law directly related to these records.
Destruction of non-essential, working or support records.

³ Retention: Until settlement of the issue.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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01 – ADMINISTRATION / LEGAL AFFAIRS

01.48

Legal proceedings

Records relating to legal matters dealt with or submitted to a court of law or an administrative tribunal for or against the institution: legal correspondence and pleadings, statements, demands, directions, defence, actions, subpoenas and notices to appear, orders, discharges, garnishments, rulings, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	R ³
secondary [a]	other units concerned	X ⁴		D

Notes : (**D** = Destruction **R** = Retention)

- ¹ Retention: Until settlement of the case (conclusion of proceedings, including rights to appeal, or until execution of judgement).
² Retention: 10 years for records involving the institution after January 1, 1994; 30 years for records relating to legal proceedings involving the institution prior to December 31, 1993.
³ Archives selection: Retention of records relating to legal proceedings with a major impact on university life, relations with clients or the institution's activities: procedures, exhibits, certified transcripts of out-of-court testimony, written submissions, arguments, transactions, discharges, etc.
⁴ Retention: Until settlement of the case.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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01 – ADMINISTRATION / LEGAL AFFAIRS

01.49

Public liability insurance

Records relating to agreements whereby, for a premium, insurers agree to indemnify the institution or one of its components in the case of incidents covered by an insurance policy (fire, theft, damage, etc.): insurance proposal, insurance contract, records relating to competitive bids, renewal of insurance policies, claims, settled claims. etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	10 ²	D ³
secondary [a]	other units concerned	X ⁴		D

Notes : (D = Destruction R = Retention)

- ¹ Retention of official records relating to insurance (contracts, riders, etc.): as long as the policy is in effect (records relating to claims are kept in the office until the claim is settled).
- ² Retention: 10 years following expiry of the insurance policy or until complete settlement of all claims relating to the insurance.
- ³ Destruction. Policies relating to group insurance are kept in Archives and are covered under a separate schedule (see schedule 02.20).
- ⁴ Retention: Until settlement of the claim.

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Records Retention Schedules for
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01 – ADMINISTRATION / LEGAL AFFAIRS

01.51

Major claims

Records relating to major claims brought by or against the institution (mainly involving insurance companies), concerning the payment of major damages or the execution of a judgement following significant damages suffered by the institution or one of its units (defects in construction, etc.).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	10 ²	R ³
secondary [a]	other units concerned	X ⁴		D

Notes : (D = Destruction R = Retention)

¹ Retention: Until settlement of the claim.

² Retention: 10 years following settlement of the claims.

³ Archives selection: Retention of summary records or, in their absence, specific records dealing with the circumstances and process of settlement of a major claim. Destruction of working or support records and non-essential correspondence.

⁴ Retention: Until settlement of the claim.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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01 – ADMINISTRATION / LEGAL AFFAIRS

01.52

Minor contracts

Legal records confirming a minor agreement between the institution and an individual or a corporate entity related to the administrative or academic management of the institution: contracts for minor purchases, services, rentals, articles, loans, inter-university loans, co-operation agreements, etc. This schedule also covers records associated with minor contracts.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	10 ²	R ³
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: Until expiry of the contract.

² Retention: 10 years following expiry of contract or its last renewal.

³ Archives selection: Retention of official records related to minor contracts having a significant bearing on the life of the university and the institution's administrative activities: partnership agreements, affiliation agreements, significant teaching or research contracts, contracts for the development of special programs, etc. Destruction of substantiating records (preliminary versions, working notes, records of transmission, etc.).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

01 – ADMINISTRATION / LEGAL AFFAIRS

01.53

Major contracts

Legal records confirming major agreements between the institution and an individual or corporate body, related to the purchase of a building or property, construction of a building and other instances of similar importance: contracts, agreements or covenants, title deeds, deeds of sale or purchase, easements, localization certificates, leases, tenders, preliminary studies and estimates, quotations, specifications, plans, correspondence, records relating to indemnities for expropriations and all records associated with major contracts.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	10 ²	R ³
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: Until end of contract (end of construction work, registration of transfer of buildings, property, etc.).

² Retention: 10 years after expiry of the term of the contract.

³ Archives selection: Retention of official records related to major contracts. Destruction of substantiating records (preliminary versions, working notes, records of transmission, etc.).

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Records Retention Schedules for
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01 – ADMINISTRATION / LEGAL AFFAIRS

01.54

Licences and permits

Records relating to government licence and permits necessary to the conduct of the institution's affairs.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: As long as the license or permit is valid.

² Archives selection: Retention of the records most representative of the institution's activities (example: building permits). Destruction of records issued in the course of very specific activities (example: alcohol permit for a reception).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

01 – ADMINISTRATION / LEGAL AFFAIRS

01.55

Requests for access to public records

Records relating to requests for access to the institution's public records in compliance with the *Act respecting documents held by public bodies and the protection of personal information R.S.Q. A-2.1*: requests for access, acknowledgements of receipt, replies from the person responsible for access to records, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	R ³
secondary [a]	other units concerned	X ⁴		D

Notes : (**D** = Destruction **R** = Retention)

- ¹ Retention: Until closeout of the file (conclusion of procedures, including rights to appeal, or until execution of judgement, if applicable).
² Retention: 10 years in the case of requests addressed to the institution after January 1, 1994; 30 years in the case of records related to requests made to the institution before December 31, 1993 (requests that simply elicited a response by the person responsible for access to records are kept for 10 years).
³ Archives selection: Retention of decisions by the Commission d'accès à l'information du Québec (Quebec's access commission) specifically relating to the institution.
⁴ Retention: Until closeout of the file.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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01 – ADMINISTRATION / LEGAL AFFAIRS

01.56

Requests for personal information

Files comprising various records relating to requests for personal information held by the institution in compliance with the *Act respecting documents held by public bodies and the protection of personal information R.S.Q. A-2.1*: requests for access, correction or review, acknowledgements of receipt, replies from the person in charge of access to records, etc.

Copy	Unit	Active	Semi-active	Inactive
Primary [a]	unit responsible	X ¹	X ²	R ³
Secondary [a]	other units concerned	X ⁴		D

Notes : (D = Destruction R = Retention)

- ¹ Retention: Until closeout of the file (until conclusion of procedures including rights to appeal, if applicable).
² Retention: 10 years in the case of requests addressed to the institution after January 1, 1994; 30 years in the case of requests made before December 31, 1993 (requests that simply elicited a response by the person responsible for access to records are kept for 10 years).
³ Archives selection: Retention of decisions of Quebec's access commission specifically relating to the institution.
⁴ Retention: Until closeout of the file.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

01 – ADMINISTRATION / LEGAL AFFAIRS

01.57

Personal information files management

Records relating to the management of personal information files kept by the institution: declarations of personal information files to Quebec's access commission, agreements between public bodies for the transmission of personal information, authorizations by Quebec's access commission, personal information file consultation logs, etc..

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	10 ²	R ³

Notes : (D = Destruction R = Retention)

¹ Retention: As long as the records are in effect or until their replacement by a new version.

² Retention: 10 years following the end of file use (or replacement of records by a new version).

³ Archives selection: Retention of agreements between public bodies for the transmission of identifying information and authorizations by Quebec's access commission.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

02 - HUMAN RESOURCES / STAFFING

02.01

Position management – Electronic records

Data used in the management of employment positions: incumbents, position status, job descriptions, position groups, benefit plans, start dates, position titles, classifications, salaries, etc.

copy	Unit	active	semi-active	inactive
primary [c]	unit responsible	X ¹	X ²	D ³

Notes : (**D** = Destruction **R** = Retention)

¹ Retention 1 year following abolition of position (data updated regularly).

² Retention 10 years or as long as system exists.

³ Destruction: Research value ensured by the retention (with archives) of original records on paper or microfilm (see schedule [02.02](#)).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

02 - HUMAN RESOURCES / STAFFING

02.02

Staff and position management

Records dealing with the planning, inventory, evaluation, and changes in staffing: studies, analyses, reports and recommendations on personnel requirements and position status, creation, evaluation, classification, distribution, abolition and transfer of positions, staffing plans, position inventories and structures, staff hiring plans, staff lists, seniority lists, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D

Notes: (D = Destruction R = Retention)

¹ Retain as long as records are in effect or until replacement by a new version.

² Archives selection: Retain official staff plans, hiring plans specific to the institution, cumulative records of positions, cumulative lists of staff and seniority, as well as reports and studies on the creation, transfer or abolition of positions. Destroy support documents (periodic non-official lists, incomplete reports, etc.).

[] = medium--->a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

02 - HUMAN RESOURCES / STAFFING

02.03

Staff functions

Records relating to the definition of employee functions and duties: job and duty descriptions, work plans, allocation of administrative, teaching and other duties, external professional activities, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retain as long as records are in effect or until replacement by a new version.

² Archives selection: Retain official descriptions of functions and duties of personnel, work plans or reports documenting division of teaching duties, duties other than teaching and outside professional activities of teaching staff. Destruction of support records (work forms, preliminary lists, etc.).

[] = medium--->a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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02 - HUMAN RESOURCES / STAFFING

02.04

Staff recruitment – Electronic records

Data used in the follow-up of postings of position openings: position identifications, candidate information (evaluations, seniority classifications, etc.).

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹		D ²

Notes : (D = Destruction R = Retention)

¹ Retention 1 year after closing of position staffing process.

² Destruction: Research value ensured by retaining the following records on paper: official staff plans, hiring plans, cumulative position logs, cumulative staff and seniority lists (schedule [02.02](#)), job offers, hiring criteria, management and regular teaching staff recruiting files (schedule [02.05](#)).

[] = medium---> a = paper b = microfilm c = electronic d = audio-visual e = other

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02 – HUMAN RESOURCES / STAFFING

02.05

Staff recruitment

Records relating to staffing competitions: personnel requisitions, job descriptions, hiring criteria and qualification requirements, job vacancy notices, recruiting files, job offers, announcements or advertisements, postings, offers of service and job applications, curriculum vitae, invitations to interview, evaluation guides, tests and results, selection grids, summaries of interviews, selection committee reports, correspondence, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	R ³
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

- ¹ Retention 1 year following end of competition or until settlement of last grievance associated with recruiting process.
² Retention 2 years or as long as recruiting process can be contested (according to the terms of the collective agreement concerned).
³ Archives selection: Retain offers of employment, hiring criteria, recruiting files for management and regular teaching staff. Destruction of other recruiting files, outdated evaluation tests and support records.

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RECORDS RETENTION SCHEDULES FOR
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02 - HUMAN RESOURCES / STAFFING

02.06

Staff hiring

Records necessary for the hiring or appointment of staff: hiring procedures and statistics, standards used in negotiating and establishing special hiring conditions and methods of integrating new staff, orientation guides, etc. (this does not cover hiring contracts filed in employee files, which are covered under separate schedules; see schedules [02.08](#) to [02.11](#)).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention until records are replaced by a new version or until the end of a specific appointment process.

² Archives selection: Retain cumulative listings of appointments, procedures, standards, orientation guides for various personnel categories. Retain records documenting appointment management processes (election files are covered under a separate schedule). Destruction of support records.

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RECORDS RETENTION SCHEDULES FOR
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02 - HUMAN RESOURCES / PERSONNEL FILES

02.07 Personnel files – Electronic records

Data used in personnel management: sociological employee data, degree(s), experience, hiring dates, conditions of employment, career monitoring, staff movements, salaries, remuneration models, union affiliations, functions and duties, seniority, professional development, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹	X ²	D ³

Notes : (D = Destruction R = Retention)

¹ Retention 2 years following employee's departure (data updated regularly and normally cumulative).

² Retention until 100th anniversary of employee's birth.

³ Destruction: Research value ensured by retaining the following records on paper: employee files, employment offers, staff plans, staff lists, seniority lists, duty and responsibility descriptions, work plans, outside professional activities, cumulative files of professional activities, etc. (see schedules [02.02](#), [02.03](#), [02.05](#), [02.08](#) and [02.10](#)).

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RECORDS RETENTION SCHEDULES FOR
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02 - HUMAN RESOURCES / PERSONNEL FILES

02.08

Personnel files: Professors and lecturers

Records used in the management of academic staff (professors and lecturers): correspondence, contracts, curricula vitae, degree and experience certifications, salary and benefits progressions, professional activities, cumulative files of professional development activities, evaluations, promotions, duties, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	R ³
secondary [a]	other units concerned	X ⁴		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention 2 years following employee's departure.

² Retention until 100th anniversary of employee's birth (transfer of records to microfilm recommended).

³ Archives selection: Retain files of employees born in the years 01 and 06 of every decade and a selection of files of professors and lecturers particularly celebrated in their teaching, research or innovation field, who have received awards, recognition and other distinctions. Retain files in toto if transferred to microfilm (destruction of hard copies).

⁴ Retention 1 year following employee's departure.

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02 - HUMAN RESOURCES / PERSONNEL FILES

02.09

Personnel files: Auxiliary teaching staff

Records used in the management of auxiliary teaching staff (teaching or research assistants or instructors, markers, tutors, demonstrators): correspondence, contracts, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	D
secondary [a]	other units concerned	X ³		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention 2 years following employee's departure.

² Files of auxiliary teaching staff participating in the institution's benefits programs (insurance, pensions, etc.) are kept until the 100th anniversary of employee's birth.

³ Retention in office 1 year after employee's departure.

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02 - HUMAN RESOURCES / PERSONNEL FILES

02.10

Personnel files: Managerial, administrative and support

Records used in the management of managerial, administrative and support staff: employment offers, curricula vitae, employment contracts, birth certificates, certifications of diplomas and experience, job descriptions, salary and benefits progressions, professional development activities, evaluations, promotions, correspondence (hiring, development, departures, resignations, etc.).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	R ³
secondary [a]	other units concerned	X ⁴		D

Notes : (D = Destruction R = Retention)

- ¹ Retention 2 years following employee's departure.
² Retention until the 100th anniversary of employee's birth (transfer of records to microfilm recommended). Files of casual employees who do not participate in the institution's benefits programs (insurance, pensions, etc.) are retained 5 years then destroyed.
³ Archives selection: Retain senior management files and files of administrative and support personnel born in the year 01 of each decade.
⁴ Retention 1 year following employee's departure.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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02 - HUMAN RESOURCES / PERSONNEL FILES

02.11

Personnel files: Student staff, interns

Records relating to student employment (summer jobs, part-time student contracts, etc.) and internships: employment contracts, proofs of enrolment in a program of studies, internship plans, internship reports, evaluation sheets, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		D
secondary [a]	other units concerned	X ²		D

Notes : (D = Destruction R = Retention)

¹ Retention 3 years following departure of student or intern.

² Retention 1 year following departure of student or intern.

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02 - HUMAN RESOURCES / WORKING CONDITIONS AND BENEFITS

02.12 Work schedules

Records relating to the management and control of personnel work schedules: timetabling, methods of application, requests to change work schedules, flexible hours controls, employee time management data capture and verification records (time sheets, punch cards, attendance sheets, performance reports), etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	1 year	5 years	D
secondary [a]	other units concerned	1 year		D

Notes : (**D** = Destruction **R** = Retention)

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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02 - HUMAN RESOURCES / WORKING CONDITIONS AND BENEFITS

02.13

Payroll characteristics – Electronic records

Data used in describing institution's payrolls: teacher names and numbers, salary codes, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹	X ²	D

Notes : (D = Destruction R = Retention)

¹ Retention 1 year after sending to CREPUQ and the Ministry of Education.

² Retention 10 years or as long as system exists.

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02 - HUMAN RESOURCES / WORKING CONDITIONS AND BENEFITS

02.14 Payroll characteristics

Data or reports produced during the institution's payroll process. These records primarily show teacher numbers and names, salary codes, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	D

Notes : (**D** = Destruction **R** = Retention)

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Records Retention Schedules for
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02 - HUMAN RESOURCES / WORKING CONDITIONS AND BENEFITS

02.15

Salary scales – Electronic records

Data concerning the various salary scales used in salary transactions with institution employees.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	2 years	X ¹	D ²

Notes : (**D** = Destruction **R** = Retention)

¹ Retention 3 years or as long as data are necessary to the implementation of collective agreements (salary retroactivity, etc.).

² Destruction: Research value ensured by retaining the following records on paper: salary scales and records relating to employee bases of pay. (schedule [02.16](#)).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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02 - HUMAN RESOURCES / WORKING CONDITIONS AND BENEFITS

02.16 Salary scales and pay bases

Records relating to the institution's remuneration and salary scales: salary scales or bases of pay for different categories of employees, reports on salary increases, revisions of salary rates, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retain as long as records are in effect or until replacement by a new version.

² Archives selection: Retain salary scales and records relating to bases of remuneration of the institution's employees (except those that are found in collective agreements and other agreements with different categories of employees; these are retained in archives according to the provisions of schedule [02.38](#)). Destruction of reports, lists and support documents.

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02 - HUMAN RESOURCES / WORKING CONDITIONS AND BENEFITS

02.17

Benefits management – Electronic records

Data used in the management of the institution's employee benefits programs: enrolment in and contributions to benefits programs, time banks, leave monitoring (type, duration), etc.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹	X ²	D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention 2 years after employee's departure. Data relating to time banks and leave taken may be destroyed 5 years after recording unless required for implementation of collective agreements (salary retroactivity, etc.).

² Retention until 100th anniversary of employee's birth.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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02.18 Benefits management

Records used in the management of personnel benefits: benefit contributions (employee, employer), reports on the administration and payment of benefits, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	D
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retain as long as records are in effect or until replaced by a new version.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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02 - HUMAN RESOURCES / WORKING CONDITIONS AND BENEFITS

02.19

Absences and leaves

Records used in managing staff absences and leaves: leave applications (illness, personal, death), notices and certifications of absence, notices of return, calendars, requests, vacation notices and authorizations, employee absence profiles, absence reports, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	D
secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

¹ Retention 1 year. Records relating to leaves without pay, maternity leaves, deferred or planned leaves are normally placed in employee files; these are covered in separate schedules (see schedules [02.08](#) to [02.11](#)).

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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02 - HUMAN RESOURCES / WORKING CONDITIONS AND BENEFITS

02.20

Group insurance

Records relating to the administration of group insurance plans (life, salary, accident, illness, dental, etc.): contracts and amendments, lists of insured parties, renewals, premium billings, claims, correspondence, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	R ³
secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

¹ Retain as long as insurance plans are in effect, until all claims are settled or as long as there are beneficiaries or successors (to the extent that it is possible to benefit from the plan). Retain insurance claims in office 1 year.

² Retention 10 years after closing file.

³ Archives selection: Retain group insurance policies, contracts and amendments. Destruction of claims and support records (billings, etc.).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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02 - HUMAN RESOURCES / WORKING CONDITIONS AND BENEFITS

02.21 Salary insurance – Electronic records

Data used in employee salary insurance programs: payable hours, employee benefit histories, claims and compensation, payment transactions, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	2 years	X ¹	D

Notes : (D = Destruction R = Retention)

¹ Retention 4 years or as long as data are required for application of collective agreements (salary retroactivity, etc.).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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02 - HUMAN RESOURCES / WORKING CONDITIONS AND BENEFITS

02.22 Salary insurance – Employees

Records relating to employee salary insurance benefit claims.

Copy	Unit	Active	Semi-active	Inactive
Primary [a]	unit responsible	X ¹	X ²	D ³

Notes : (D = Destruction R = Retention)

¹ Retention 2 years after closing file.

² Retention 4 years or as long as records are required for application of collective agreements (salary retroactivity, etc.).

³ Destruction: Cumulative reports of data relating to employee salary progressions and benefits (including salary insurance data) are normally kept in employee files; these are covered under a separate schedule (see schedules [02.08](#) to [02.11](#)).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

02 - HUMAN RESOURCES / WORKING CONDITIONS AND BENEFITS

02.23

Life insurance – Employees

Records relating to employee's designation of beneficiaries and to claims and payments of life insurance benefits.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	D

Notes : (D = Destruction R = Retention)

¹ Retention 1 year following employee's departure or 1 year following full settlement to beneficiaries in the event of employee's death.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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02 - HUMAN RESOURCES / WORKING CONDITIONS AND BENEFITS

02.24 Accident, illness, drug insurance – Employees

Records relating to employee enrolment, enrolment of eligible children, claims for reimbursement for medical expenses and all claims for accident, illness or drug insurance benefits.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	4 years	D

Notes : (D = Destruction R = Retention)

¹ Retention 2 years following closing of file. Retain records relating to minor and routine claims for 2 years, then destroy.

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02 - HUMAN RESOURCES / WORKING CONDITIONS AND BENEFITS

02.25

Retired employees – Electronic records

Data on retired employees.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹		D ²

Notes : (**D** = Destruction **R** = Retention)

¹ Retain until 100th anniversary of birth date of retired employee or until employee's death.

² Destruction: Research value ensured by retaining the following records on paper: reports produced for agencies responsible for administering pension plans (schedule [02.26](#)).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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02 - HUMAN RESOURCES / WORKING CONDITONS AND BENEFITS

02.26

Pension plans

Records relating to the administration of employee pension plans: lists of participants, correspondence and reports produced for agencies responsible for administration of pension plans, annual reports, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	4 years	R ²
Secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

¹ Retention 2 years (until settlement or judgement in cases of grievance or legal procedures) or until replacement of records by a new version.

² Archives selection: Retain reports produced for agencies responsible for administration of retirement pension plans and pension plan annual reports. Destruction of support documents.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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02 - HUMAN RESOURCES / WORKING CONDITIONS AND BENEFITS

02.27 Pension plans – Employees

Employee pension plan records relating to: enrolment, participation records for unpaid leave or following retirement, pension estimates, status of contributions and interest, correspondence transfers, contributions, entitlement statements following legal separation, divorce or annulment of marriage (division of family patrimony), dependent minor children certificates, requests for corrections, declarations of common-law spouse, buy-back requests, employment termination notices, applications for pension benefits, severance pay, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	D
secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

¹ Retention 1 year following transfer of pension funds to another institution or after full settlement to beneficiary and his/her successors. Contribution statements destroyed on receipt of a new version.

² In the case of departure or transfer, retain until the 100th anniversary of employee's birth. Retain statements of contributions and interest until replacement by a new version.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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02 - HUMAN RESOURCES / OCCUPATIONAL HEALTH AND SAFETY

02.28

Occupational health and safety

Records relating to occupational health and safety, prevention programs, workplace inspections, ergonomics, workplace quality of life, accidents in the workplace, inspection reports, application of labour standards, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retain reports documenting health and safety measures and programs adopted by the institution.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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02 - HUMAN RESOURCES / OCCUPATIONAL HEALTH AND SAFETY

02.29

Occupational accident records

Records relating to employees' accidents at work: case summaries, progress notes, employer's notifications to the *Commission de la santé et de la sécurité du travail du Québec (CSST)*, temporary assignment notices, claims, reimbursement applications, medical certificates and reports, work fitness certificates, correspondence and various forms issued by the CSST.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	D
secondary [a]	other units concerned	X ³		D

Notes : (D = Destruction R = Retention)

- ¹ Retention 1 year following full settlement of case.
² Retention until 100th anniversary of employee's birth.
³ Retention 1 year following employee's departure.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

02 - HUMAN RESOURCES / OCCUPATIONAL HEALTH AND SAFETY

02.30

Employee medical records

Records relating to employee health (workplace accidents are covered in a separate schedule): general information, case histories, evaluations, diagnoses, examination results, specialist reports, care prescribed, progress reports, records relating to preventive withdrawal or temporary postings for reasons of pregnancy or maternity, correspondence with the *Commission de la santé et de la sécurité au travail du Québec*, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	D
secondary [a]	other units concerned	X ³		D

Notes : (D = Destruction R = Retention)

¹ Retention until employee's departure.

² Retention 10 years following last file entry.

³ Retention 1 year following employee's departure.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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**02 - HUMAN RESOURCES /
EMPLOYEE EVALUATION, DEVELOPMENT AND MOVEMENT**

02.31

Personnel evaluations

Records relating to personnel performance evaluations: programs and evaluation guides, lists of employees to be evaluated, evaluation and employee performance criteria, disciplinary measures application policies. This schedule does not cover records connected with evaluations limited to a single employee of the institution (these records are normally filed in the employee's file and are covered under separate retention schedules: see schedules 02.08 to 02.11).

Copy	Unit	Active	Semi-active	Inactive
principal [a]	unit responsible	X ¹	X ²	R ³
secondary [a]	Other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

- ¹ Retention as long as program or records are in effect.
² Retention 5 years or as long as records are necessary for application of collective agreements (periodic evaluation, evolution of criteria, etc.).
³ Archives selection: Retain evaluation programs and guides. Destruction of support documents (lists of employees to be evaluated, etc.)

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

**02 - HUMAN RESOURCES /
EMPLOYEE EVALUATION, DEVELOPMENT AND MOVEMENT**

02.32

Professional development

Records relating to the administration of group or individual professional development activities for personnel: development programs (courses, workshops, practicums, exchange programs, etc.), applications for training, application evaluation criteria, budgets, invitations to submit projects, documentation, publicity and announcements, registration lists, activity reports, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

- ¹ Retain as long as records are in effect (programs evaluation criteria, etc.) or 2years after conducting development activity.
² Archives selection: Retain programs, activity reports and the institution's human resources development plans. Destruction of support documents (budgets, publicity, documentation, etc.).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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62 - HUMAN RESOURCES /				
EMPLOYEE EVALUATION, DEVELOPMENT AND MOVEMENT				
62.33 Professional development - Employees				
Records documenting the completion of various employee professional development activities, specifically: to participate in specific professional development activities (courses, workshops, lectures, seminars, etc.), requests for exemption or nonparticipation in tuition fees, grant applications, requests for professional development leave, activity reports, etc.				
TYPE	UNIT	ACTIVE	BAKED ACTION	EXPIRATION
primary (A)	not responsible	Y		DP
secondary (B)	other with assistance	1 year	2 years	D
NOTES: (B) 01/01/2020 - 01/01/2021				
Notes and closing of the Journal of activity report and involvement of experience, updating of descriptive record of employee's professional development activities... Records documenting the completion of various employee professional development activities, specifically: to participate in specific professional development activities (courses, workshops, lectures, seminars, etc.), requests for exemption or nonparticipation in tuition fees, grant applications, requests for professional development leave, activity reports, etc.				
1. A: primary - 0.1: primary - 0.2: secondary - 0.3: secondary - 0.4: public record - 0.5: other				
Primary Schedule Bakel Schedule				
10/01/2020 14:37:00				

**02 - HUMAN RESOURCES /
EMPLOYEE EVALUATION, DEVELOPMENT AND MOVEMENT**

02.34 Staff social functions

Records relating to various staff social activities: celebrations, sports and athletic events, choirs, social clubs, charitable activities, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	3 years		D
secondary [a]	other units concerned	x ¹		D

N o t e s : (**D** = Destruction **R** = Retention)

¹ Retention until date of activity.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

**02 - HUMAN RESOURCES /
EMPLOYEE EVALUATION, DEVELOPMENT AND MOVEMENT**

02.35 Employee assistance programs

Records documenting assistance, evaluation and reference services to specific persons or the organization of information, awareness and prevention activities offered to staff: workshops, lectures, joint committees, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

¹ Retain working files on organization of activities for 2years after conducting activity. Files documenting personal interventions (involving employees) are confidential and are normally kept under the supervision of the officer responsible for the EAP, who should dispose of them according to the operative code of ethics.

² Archives selection: Retain annual statements of activities and destroy working or support files.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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**RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS**

**02 – HUMAN RESOURCES /
EMPLOYEE EVALUATION, DEVELOPMENT AND MOVEMENT**

02.36

Staff movement

Records relating to employee promotions, changes, reclassifications, demotions, transfers, temporary assignments, rebates, lay-offs, terminations, firings, retirements (lists, assignment application forms, etc.).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	1 year	5 years	R ¹
secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: retain professor promotion files (if these records are not filed in employee files.) Destruction of working records (forms, lists) and files relating to other categories of employee (records of employee movements are normally included in employee files and are covered under separate retention schedules; see schedules 02.08 to 02.11).

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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**RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS**

02 – HUMAN RESOURCES / LABOUR RELATIONS

02.37

Unions and employee associations

Records relating to employee unions, associations and groups: accreditations, dues, membership applications, identification of union delegates, requests for leave for union business, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	4 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retain 1 year (requests for leave for union business), as long as records are in effect (accreditations, association recognition) or until updated.

² Archives selection: Retain union accreditations or records documenting decisions relating to the recognition of employee associations or groups. Destruction of support documents (delegate lists, union business leaves, etc.).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

02 – HUMAN RESOURCES / LABOUR RELATIONS

02.38

Employment contracts or agreements

Records relating to the negotiation, approval and application of collective agreements between the institution and the various unions or associations representing its employees: bargaining files (correspondence, offers and demands of parties involved, strategy records, proceedings of bargaining sessions, press files), contracts, collective agreements or understandings (letters of understanding attached), cost projections, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	R ³
secondary [a]	other units concerned	X ⁴		D

Notes : (D = Destruction R= Retention)

¹ Retain as long as records are in effect.

² Retention 10 years or for the duration of the next two collective agreements.

³ Archives selection: Retain the first management and union offers, the objectives and mandates of both parties, final versions of work contracts, letters of understanding, press files and documents relating to the interpretation of collective agreements. Destruction of bargaining process support documents.

⁴ Retention until contract is signed.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

02 – HUMAN RESOURCES / LABOUR RELATIONS

02.39

Labour relations

Records relating to grievances (grievance forms, correspondence, settlements, reports of hearings, letters of understanding), arbitrations, adjudications, labour disputes (records of job actions/pressure tactics, strikes, lock-outs, work stoppages, study days, essential services, disciplinary measures, etc.).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	R ³
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

- ¹ Retain until final resolution (settlement of grievance, end of labour dispute or disciplinary measures).
² Retention 10 years. Where applicable, records relating to disciplinary measures should be destroyed immediately after the expiry of the retention period set out in the collective agreement concerned.
³ Archives selection: Retain adjudication decisions, significant documents on major labour disputes (injunctions, legal action or procedures, legal decisions, press files, etc.) and definitions of essential services. Destroy grievances and disciplinary measures.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

03 - FINANCIAL RESOURCES / FUNDING

03.01

Budget rules and operating grant calculations

Records relating to the calculation of operating grants accorded by the Ministry of Education: budgeting rules, grant allocation models, performance contracts, working records, details of grants received, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	5 years	R
secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

03 - FINANCIAL RESOURCES / FUNDING

03.02

Fundraising campaigns – Electronic records

Data used in managing fundraising campaigns: donors, fundraisers, donations, pledges, accounting transactions, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹	5 years	D ²

Notes : (**D** = Destruction **R** = Retention)

1. Retention: 2 years following the last donation entry or as long as data may be used in subsequent fundraising campaigns (for example, according to intervals between class anniversaries/reunions).
2. Destruction: Research value ensured by retention of the following records on paper: records documenting the organization and operation of fundraising campaigns, reports showing results obtained and donor lists (see schedule [03.03](#)).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

03 - FINANCIAL RESOURCES / FUNDING

03.03

Fundraising campaigns

Records relating to the organization and operation of fundraising campaigns: recruitment of fundraisers, donor lists, financial reports, accounting records relating to donations (lists of charitable receipts, lists of direct debits, lists of deductions at source, etc.).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ³		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years following the last donation entered or as long as the records may be used in future fundraising campaigns (for example, according to intervals between class anniversaries/reunions).

² Archives selection: Retention of summary records documenting the organization and operation of fundraising campaigns, reports showing results obtained and donor lists. Destruction of support documents: recruitment of fundraisers, lists of accounting reports, etc.

³ Retention: Until the end of the fundraising campaign.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

03 – FINANCIAL RESOURCES / FUNDING

03.04

Foundations, endowments

Records relating to the ongoing management of the various endowment and subscription funds administered by the institution: correspondence, financial records, etc. concerning the constitution, investment and use of sums of money given to the institution by individuals or organizations for general or specific purposes (chairs, special funds, etc.).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ³		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years following end of use of funds concerned.

² Archives selection: Retention of general information on the financial nature and development of each fund (creation, objectives, summary records, financial tables showing the financial development and portfolio composition of each fund). Destruction of support records.

³ Retention: Until end of use of funds concerned.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

03 – FINANCIAL RESOURCES / BUDGETS

03.05

Budgets – Electronic records

Data used to prepare and follow up on budgets of the institution and its various components (operating funds, investment funds, research funds, special funds, trust funds): budget estimates, annual budgets (statements of revenue and expenditure), accounting management of budgetary activities, financial reports, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	2 years	5 years	D ¹

Notes : (**D** = Destruction **R** = Retention)

¹ Destruction: Research value ensured by retention of the following paper records or microfilm: official versions of budgets approved, global statements of expenditures at fiscal-year-end and detailed budget accounting statements (see schedule 03.06).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

03 – FINANCIAL RESOURCES / BUDGETS

03.06

Budgets

Records relating to the planning, control and follow-up of the budgets of the institution and its various components (operating funds, investment funds, research funds, special funds, trust funds), to the management of budget frameworks, budget rules, budget estimates and submissions, to recurrent budget plans, approved budgets and plans for consolidating or balancing budgets, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years (given the volume of records, production of budget reports on microfilm is recommended).

² Archives selection: Retain budget plans, five-year investment plans, official versions of approved budgets, global statements of expenditures at fiscal year-end and detailed budget statements (if there are cumulative reports, only the last statement of the fiscal year should be retained).

Destruction of budget preparation and follow-up support documents: Development documents, estimates, budget calculations, submissions and modifications, summary budget reports, periodic budget reports and accounting statements (statements, summary statements of revenue and expenditure, statements of surpluses and deficits, deviation analyses, summaries of transfers and additional budgets, reports on capital expenditures), etc.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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03 - FINANCIAL RESOURCES / ACCOUNTING

03.07 Accounting – Electronic records

Data used in managing accounting system budget activities: outstanding obligations, yearly transactions, cash or treasury journals (cash receipts and disbursements), general ledgers, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹	5 years	D ²

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years (data relating to outstanding obligations can be destroyed as soon as obligations have been reported or debited).

² Destruction: Research value ensured by retention of the following records on paper or microfilm: general ledgers or equivalent, accounting systems, cash or treasury journals (cash receipts and disbursements) and journal entries (general ledger) (see schedule [03.08](#)).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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03 – FINANCIAL RESOURCES / ACCOUNTING

03.08

Accounting

Records relating to the management of the accounting system: accounting charts, general ledgers, cash or treasury journals (receipts and disbursements), general journals, purchase journals, supporting documents, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retain accounting system general ledgers or equivalent, cash or treasury journals (receipts and disbursements) and journal entries (general journal) unless the equivalent information is available in general ledgers. Destruction of supporting documents and all other support documents used in the management of the accounting system.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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03 - FINANCIAL RESOURCES / ACCOUNTING

03.09

Accounts receivable – Electronic records

Data used in the management of accounts receivable: internal invoicing, external invoicing, management of client accounts, clientele payment monitoring, retail sales controls, etc. Student accounts data are covered under a separate retention schedule (see schedule [03.11](#)).

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹	5 years	D ²

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years after the final payment of an account or closing of collection file.

² Destruction: Research value ensured by retention of the following records on paper or microfilm: general ledgers or equivalent, cash or treasury journals (receipts and expenditures) and journal entries (general ledger) (schedule [03.08](#)).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

03 – FINANCIAL RESOURCES / ACCOUNTING

03.10

Accounts receivable

Records relating to the management of accounts receivable and revenue controls (general revenues, investments, sponsorships, sales of services etc.). Records relating to student accounts are covered under a separate retention schedule (see schedule [03.12](#)).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	D
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years after payment of account or closing of collection file.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

03 – FINANCIAL RESOURCES / ACCOUNTING

03.11

Student accounts – Electronic records

Data used in the invoicing, collection and management (including issuance of receipts for tax purposes) of tuition fees and other fees payable by the institution's students.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	x ¹	5 years	D ²

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after final payment of account or closing of collection files or as long as the student is liable.

² Destruction: Research value ensured by retention of the following records on paper or microfilm: general ledgers or equivalent, cash or treasury journals (receipts and disbursements) and journal entries (general ledgers) (schedule [03.08](#)).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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03 – FINANCIAL RESOURCES / ACCOUNTING

03.12

Student accounts

Records relating to the control of invoicing, collection and management of tuition fees and other fees payable by the institution's students: student accounts statements, records dealing with invoicing, payments and recoveries of tuition fees, issue of tuition receipts for tax purposes, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	D
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after payment of account or closing of collection file.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

03 - FINANCIAL RESOURCES / ACCOUNTING

03.13

Grants

Records relating to the financial management of the various grants received: applications to open a research budget account, financial reports, correspondence, budget amendments, grant cheque stubs and all supporting documents required for the control of research grant budgets (research budget account openings, decreases, increases or modifications). Records relating to grant applications (subjects, objectives, timetables, etc.), to the use of amounts allocated and to the results of research projects so funded are covered in a separate retention schedule (see schedule [08.07](#)).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	x ¹	5 years	D
secondary [a]	other units concerned	x ²		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after end of research project and closing of file.

² Retention: 2 years after end of research project (copies of support documents are destroyed after 2 years).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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03 – FINANCIAL RESOURCES / ACCOUNTING

03.14

Accounts payable – Electronic records

Data used in following up on requests for payment from the receipt of invoices to their payment by the supplier's deadline. Such files also allow the preservation of paid or cancelled cheque materials, the issuing of cheques to various suppliers in payment of invoices received, the issuing of student bursary cheques, the preservation of files on suppliers who have issued invoices to accounts payable, the consolidation of purchase orders and invoices, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹	5 years	D ²

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years following final account payment.

² Destruction: Research value ensured by retention of the following records on paper or microfilm: general ledgers or equivalent, cash or treasury journals (receipts and disbursements) and general ledger entries (schedule 03.08).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

03 - FINANCIAL RESOURCES / ACCOUNTING

03.15

Accounts payable

Records relating to the management of accounts payable: invoices, requests for payment, supporting documents, suppliers' account files, cheques (cashed, cancelled, returned, NSF, cheque copies), logs and lists of cheques issued, records relating to the administration of petty cash, reimbursements of expenses incurred for travel, representation, moving, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	X ¹	D
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 5 years or the duration of warranty, whichever is longer (warranties may also be kept in the movable assets file, covered under schedule [04.10](#)).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

03 – FINANCIAL RESOURCES / SALARY MANAGEMENT

03.16

Salary management – Electronic records

Data used in the cyclical process of remunerating the institution's employees: payment of salaries, production of remittance reports, employment statements, financial forms, pension fund reports, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	2 years	X ¹	D ²

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: Until the 100th anniversary of the employee's birth (for purposes of reconstituting pension plans or for any other operations involving retroactive treatment of previous data). Data used to produce global administrative reports (total expenditures on pay for a given period, cumulative liabilities, etc.) and data relating to payment of honoraria (not involving pension plan contributions) can be destroyed after 5 years.

² Destruction: Research value ensured by retention of the following records on paper: salary scales and records relating to staff pay bases (schedule [02.16](#)).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

03 - FINANCIAL RESOURCES / SALARY MANAGEMENT

03.17

Salary management

Records relating to the administration of employees' pay: financial forms (T4, TP4), periodic reports on hours worked and salaries paid, pay journals or logs, accumulated sick leave statements, time sheets, records relating to salary deductions, authorization of deductions at source, issue of employment statements, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	X ¹	D
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Retention: 5 years or as long as records are in effect or have an effect on an employee's pay: deduction at source authorizations, records relating to alimentary pensions, benefits, specific exemptions, etc.
Retention: 75 years for records that can be used to establish an employee salary history (for purposes of reconstructing pension plans or any other operation involving retroactive analysis of past data: lists of salary deductions, lists of tax deductions, pension fund deductions, pay journals or logs, cumulative salary and liability statements, statements of earnings-per-period (cumulative), etc. (Records containing information that is available in a more comprehensive report, for example tax slips, can be destroyed after 5 years).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

**03 – FINANCIAL RESOURCES /
BANKING, LOANS, INVESTMENTS AND GUARANTEES**

03.18

Banking

Records relating to the management of the institution's banking: account statements, bank reconciliations, deposit slips, liquidity status, cheques paid, bank service contracts, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	5 years	D
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

**03 – FINANCIAL RESOURCES /
BANKING, LOANS, INVESTMENTS AND GUARANTEES**

03.19

Loans, investments and guarantees

Records relating to the management of loans, investments and guarantees, including lines of credit, term loan contracts, mortgages, forward exchange contracts, swap contracts, issues of bonds or debentures, share certificates, term deposits, investment or deposit certificates.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	D
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years following expiry of loan or investment certified by the record.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

03 – FINANCIAL RESOURCES / FINANCIAL STATEMENTS

03.20

Reports and financial statements

Records relating to the control and auditing of the institution's financial management: reports and financial statements, programs, auditing mandates and reports (internal and external), etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	8 years	R ¹
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retain annual financial statements, reports of the external auditor, annual cumulative financial reports, annual financial forms (submitted by the institution to the Quebec government), internal auditing programs and reports. Destruction of support documents used in the production of reports and financial statements and in auditing operations.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

03 - FINANCIAL RESOURCES / TAXES

03.21

Taxes

Records relating to taxes levied by various levels of government: tax statements, declarations or recoveries of sales tax and GST payments, excise tax remittances, records dealing with the issue of charitable receipts (including registration numbers), etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	5 years	D
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

04 - REAL AND MOVABLE PROPERTY / REAL PROPERTY

04.01

Property management – Electronic records

Data used in the inventory control and management of buildings, land and premises owned or rented by the institution (administrative space, premises, grounds, parking lots, sports facilities, etc.).

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹		D ²

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: as long as the institution is owner or tenant of the building or property.

² Destruction: Research value ensured by retention of paper versions of annual profiles of the institution's real property assets (see schedule [04.02](#)).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUÉBEC ACADEMIC INSTITUTIONS

04 - REAL AND MOVABLE PROPERTY / REAL PROPERTY

04.02

Property management

Records relating to the description, inventory and evaluation of the institution's buildings, premises and land: plans, specifications and inventories of real property assets, physical descriptions, protection of cultural properties, municipal assessments, lists of sports facilities and other physical resources.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of inventories providing annual profiles of the institution's real property (buildings, land, premises, etc.). Retention of official records dealing with the protection of cultural real property held by the institution.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUÉBEC ACADEMIC INSTITUTIONS

04 - REAL AND MOVABLE PROPERTY / REAL PROPERTY

04.03

Facilities management and development - Electronic records

Data used in overseeing the institution's building construction projects or refitting of its spaces: drawings and specifications, architectural designs, renovations, redevelopments and relocations, building management contracts, signage control, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹		D ²

Notes : (D = Destruction R = Retention)

- ¹ Retention: As long as data are used in the management and oversight of these activities (construction, renovation, redevelopment, relocation).
² Destruction: Research value ensured by the retention of paper records substantively documenting the institution's major construction and redevelopment projects (see schedule [04.04](#)).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUÉBEC ACADEMIC INSTITUTIONS

04 - REAL AND MOVABLE PROPERTY / REAL PROPERTY

04.04

Facilities management and development

Records relating to the institution's building construction projects, refits, relocation activities and signage: construction permits, specifications, tenders, plans and drawings, contracts and related records, surveyors' and architects' certificates, leases, correspondence, minutes of job meetings, relocation and signage management files, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	X ²	R ³
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention

¹ Retention: Until end of project (rejected tenders should be destroyed after 3 years).

² Retention: 10 years from the date the institution ceases to own the building (records dealing with minor refits, relocations and signage should be destroyed after 10 years).

³ Archives selection: Retention of records that substantively document major construction and renovation work on the institution's real property assets (tenders accepted, specifications, plans and drawings, contracts and related records, surveyors' and architects' certificates, etc.).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUÉBEC ACADEMIC INSTITUTIONS

04 – REAL AND MOVABLE PROPERTY / REAL PROPERTY

04.05

Space allocation – Electronic records

Data relating to space management the use, assignment, distribution, rentals and reservations of the institution's buildings, land and premises.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	2 years		D ¹

Notes : (**D** = Destruction **R** = Retention)

¹ Destruction: Research value ensured by the retention of the following records on paper: inventories providing an annual status profile of the institution's real property assets (schedule [04.02](#)).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUÉBEC ACADEMIC INSTITUTIONS

04 - REAL AND MOVABLE PROPERTY / REAL PROPERTY

04.06

Space allocation

Records relating to the use, assignment, distribution, rentals and reservations of the institution's buildings, land and premises for the purposes of teaching, research, innovation, social and cultural activities, meetings, colloquiums, conferences, etc.: lists of premises, lists of courses or events by location, reservation forms, user identifications, allocation requests, occupancy schedules, rental contracts for classrooms, auditoriums and theatres, laboratories, sports facilities, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	5 years	D
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUÉBEC ACADEMIC INSTITUTIONS

04 - REAL AND MOVABLE PROPERTY / REAL PROPERTY

04.07

Parking – Electronic records

Data used to manage the use of parking lots administered by the institution: entrance registrations, allocation of parking stickers, statistics, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	2 years		D

Notes : (**D** = Destruction **R** = Retention)

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUÉBEC ACADEMIC INSTITUTIONS

04 - REAL AND MOVABLE PROPERTY / REAL PROPERTY

04.08

Parking

Records relating to the management of the institution's parking lots (operation, management, maintenance, repair): parking permits, receipts for parking stickers, parking slips (showing hour of vehicle entrance and departure), daily parking reports, client lists, requisitions and invoices for towing illegally-parked vehicles, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	5 years	D

Notes : (D = Destruction R = Retention)

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUÉBEC ACADEMIC INSTITUTIONS

04 - REAL AND MOVABLE PROPERTY / MOVABLE PROPERTY

04.09

Movable property management – Electronic records

Data used to monitor the inventory and management of the institution's movable property: supply and equipment inventory controls, purchasing, ordering, deliveries, supplier relations, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹	5 years	D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after end of transaction or as long as data are in effect (orders filled, end of transactions with suppliers, expiry of warranties, updating of movable asset inventories, etc.).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUÉBEC ACADEMIC INSTITUTIONS

04 - REAL AND MOVABLE PROPERTY / MOVABLE PROPERTY

04.10

Movable property management

Records relating to the management of the institution's movable property (supplies and equipment): asset inventories, proofs of purchase, needs analyses, purchase or service requisitions and approvals (locksmiths, printers, shops, etc.), orders, tenders accepted, invoices, delivery orders, delivery location lists, acknowledgements of receipt of goods, supplier files, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	D
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after conclusion of transaction or as long as records are in effect (orders filled, end of transactions with suppliers, expiry of warranties, updating of movable asset inventories, etc.).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUÉBEC ACADEMIC INSTITUTIONS

04 - REAL AND MOVABLE PROPERTY / MOVABLE PROPERTY

04.11

Movable property allocation – Electronic records

Data used in monitoring the use and disposition of the institution's movable property (loans, rentals and sales of supplies and equipment).

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹	5 years	D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years following conclusion of transaction (date of sale, end of rental or return of borrowed equipment).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUÉBEC ACADEMIC INSTITUTIONS

04 - REAL AND MOVABLE PROPERTY / MOVABLE PROPERTY

04.12

Movable property allocation

Records relating to the monitoring of the use and disposition of the institution's movable property (loans, rentals and sales of supplies and equipment).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	D
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years following conclusion of transaction (date of sale, end of rental or return of borrowed equipment)

[] = medium ---> a = paper b = microfilm c = electronic _ d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUÉBEC ACADEMIC INSTITUTIONS

04 - REAL AND MOVABLE PROPERTY / MOVABLE PROPERTY

04.13

Vehicles

Records relating to the purchase, inventory, maintenance, repair, licensing, alteration and replacement of the institution's vehicles (automobiles, trucks, etc.).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	x ¹	3 years	D

Notes : (D = Destruction R = Retention)

¹ Retention: 1 year from the date the vehicle is deemed to be no longer in use or the property of the institution. Records relating to vehicle use (fuel consumption, travel or routing orders, mileage, reservations, operating logs, etc.) should be destroyed after 1 year.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUÉBEC ACADEMIC INSTITUTIONS

04 – REAL AND MOVABLE PROPERTY / MAINTENANCE AND REPAIR OF REAL AND MOVABLE PROPERTY

04.14

Maintenance and repair of real and movable property – Electronic records

Data used in monitoring the maintenance and repair operations of the institution's buildings, premises, grounds, equipment and physical plant: building and equipment upkeep and maintenance schedules, parts and equipment catalogues, work logs, parts and labour invoices, preventive maintenance, fuel consumption, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹	5 years	D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years or as long as data are used to monitor maintenance and repair work.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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**RECORDS RETENTION SCHEDULES FOR
QUÉBEC ACADEMIC INSTITUTIONS**

**04 – REAL AND MOVABLE PROPERTY /
MAINTENANCE AND REPAIR OF REAL AND MOVABLE PROPERTY**

04.15

Maintenance and repair of real and movable property

Records relating to the maintenance and repair of the institution's physical plant, equipment, and real property (general upkeep of buildings, premises, grounds and heating systems, janitorial services, plumbing, electrical, air conditioning, etc.): internal maintenance and repair requisitions and request forms, cost estimates, work descriptions, investigations, work orders, inspection reports, maintenance programs, supplier files for maintenance, repair, installation services, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	X ²	D
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: Until completion of maintenance and repair work (rejected tenders, requisitions, and other support records should be destroyed after 3 years).

² Retention: 10 years from the date the institution ceases to be the owner of the building or as long as the institution is renting the building (records dealing with minor maintenance and repair work should be destroyed after 10 years).

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RECORDS RETENTION SCHEDULES FOR
QUÉBEC ACADEMIC INSTITUTIONS

**04 – REAL AND MOVABLE PROPERTY /
MAINTENANCE AND REPAIR OF REAL AND MOVABLE PROPERTY**

04.16

Water, electricity, heat

Records relating to the monitoring of water quality and consumption and supply of energy resources necessary for the operation of the institution's mechanical and technical systems (electricity, natural gas, gasoline, etc.): reports of power disruptions, requests to shut off power, reports of power outages, water flow and quality analyses, periodic generator unit tests, meter readings of electricity, oil, natural gas, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	3 years		D
secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

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**RECORDS RETENTION SCHEDULES FOR
QUÉBEC ACADEMIC INSTITUTIONS**

04 - REAL AND MOVABLE PROPERTY / SECURITY

04.17

Security – Electronic records

Data used in managing prevention and security activities in the institution's buildings, premises and grounds (protection of people and real and movable property): emergency planning, prevention activities, supervision of security staff, access to buildings and premises, locks, protection of equipment, found objects, hazardous products, security equipment inventories, first aid programs, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹		D ²

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years or as long as data are in effect..

² Destruction: Research value ensured by retention of emergency measures plans on paper (schedule 04.18).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUÉBEC ACADEMIC INSTITUTIONS

04 - REAL AND MOVABLE PROPERTY / SECURITY

04.18

Prevention activities and security measures

Records relating to the planning and organization of the institution's prevention activities and security measures (protection of people and real and movable property): security services programs and reports, emergency measures, evacuation plans and exercises, organization and training of first aid teams, management of lost and found objects, security systems (fire protection, alarm systems, electronic surveillance) etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years or as long as records, programs or plans are in effect.

² Archives selection: Retention of emergency measures plans. Destruction of support records.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUÉBEC ACADEMIC INSTITUTIONS

04 - REAL AND MOVABLE PROPERTY / SECURITY

04.19

Security activities

Records relating to actions taken as a result of infractions, crimes, thefts, acts of vandalism, accidents, hazardous product spills, bomb alerts, alarm system triggerings (intrusion, fire) and other security problems arising in the institution's buildings, premises and grounds: reports, inquiry files, complaint and alarm logs, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	8 years	D
secondary [a]	other units concerned	1 year		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years following the intervention or closing of file.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUÉBEC ACADEMIC INSTITUTIONS

04 – REAL AND MOVABLE PROPERTY / SECURITY

04.20

Access to buildings and premises

Records relating to the control of access to the institution's buildings, premises and grounds: building passes, visitor registration logs, key orders, key control registers and tags, authorizations to open locks or cut padlocks, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		D
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 3 years or as long as records are in effect (key distribution controls).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUÉBEC ACADEMIC INSTITUTIONS

04 - REAL AND MOVABLE PROPERTY / SECURITY

04.21

Hazardous products

Records relating to the analysis, use, transport, storage and disposition of hazardous materials used on premises: radioactive matter (radio-isotopes), chemical substances, toxic wastes, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	8 years	D ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2years or until closing of file.

² Destruction (Destruction of records dealing with the acquisition and use of radioactive matter may require a preliminary clearance from atomic energy control authorities.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUÉBEC ACADEMIC INSTITUTIONS

04 – REAL AND MOVABLE PROPERTY / SECURITY

04.22

Security equipment

Records relating to the management of supplies and materials used in the institution's prevention and security activities: equipment inventories, apparatus inspection reports, fire extinguisher verification tags, equipment loans, distribution of first aid kits, etc.

copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		D
secondary [a]	other units concerned	X ¹		D

Notes : (D=Destruction R=Retention)

¹ Retention: 3 years or as long as records are in effect.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUÉBEC ACADEMIC INSTITUTIONS

05 - STUDENT AFFAIRS / STUDENT POPULATION

05.01

Forecasting Student Population

Records relating to the forecasting, study and analysis of the evolution of the institution's student population: projections, studies, reports, statistics, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

05 - STUDENT AFFAIRS / STUDENT POPULATION				
05.02	Student recruitment			
Records relating to promotional activities organized for the purpose of recruiting new students: open houses, college tours, participation in information fairs and functions, etc. Records relating to publicity or advertising in the media or posted in public places are covered under a separate retention schedule (see schedule 09.06).				
copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	2 years		D
Notes : (D = Destruction R = Retention)				
¹ Archives selection: Retention of reports describing activities organized and results obtained.				
[] = medium --->a = paper b = microfilm c =electronic d = audio-visual e = other				
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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

05 – STUDENT AFFAIRS / STUDENT POPULATION

05.03

Student population – Electronic records

Data used to develop a profile of the institution's student population in a given period: census data on the university population, data used to prepare preliminary and official statistics on registrations by program, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	2 years	5 years	R

Notes : (**D** = Destruction **R** = Retention)

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

05 – STUDENT AFFAIRS / STUDENT POPULATION

05.04

Student population

Records dealing with the monitoring of the evolution of the institution's student population: preliminary and official statements of registrations, admissions and activities, preliminary and official statistics, listings of full-time students, reports on the student population, university clientele inventories, analyses of student strength, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retention of official statistics, studies and reports. Destruction of preliminary records, lists and reports.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

05 - STUDENT AFFAIRS / ADMISSIONS, REGISTRATIONS, EVALUATIONS

05.05

Organization of academic session (student population) - Electronic records

Data used to monitor the management of the student population in a given academic session: issue of registration statements (invoices), issue of transcripts, lists of inactive files, registrations, potential graduates, rejected applicants, progressive penalties, students in financial arrears, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	2 years	5 years	D ¹

Notes : (**D** = Destruction **R** = Retention)

¹ Destruction: Research value ensured by retention of electronic records on the student population (schedule [05.03](#)) and the following paper records: statistics, official studies and reports relating to the student population (schedule [05.04](#)).

[] = medium ---> a = paper b = microfilm c =electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

05 - STUDENT AFFAIRS / ADMISSIONS, REGISTRATIONS, EVALUATIONS

05.06

Organization of academic session (student population)

Records relating to the monitoring of transactions associated with the management of the student population in a given academic session: reports of issue of registration statements (invoices), lists of issues of transcripts, lists of inactive files, potential graduates, rejected applicants, progressive penalties, students in arrears, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	5 years	D
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

[] = medium ---> a = paper b = microfilm c =electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

05 - STUDENT AFFAIRS / ADMISSIONS, REGISTRATIONS, EVALUATIONS

05.07

Admissions management - Electronic records

Data used in recording and monitoring transactions associated with the institution's student admissions process: student identifications, lists of applications for admission, entry of required documentation, decisions, replies, dates, admission tests (French test, tests required for certain programs), etc.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹		D ²

Notes : (D = Destruction R = Retention)

¹ Retention: 3 years following student's last registration (for students admitted but who did not register, retain 1 year following academic session applied for).

² Destruction: Research value ensured by retention of the institution's official admissions policies and statistics on paper (see schedule [05.08](#)).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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05 - STUDENT AFFAIRS / ADMISSIONS, REGISTRATIONS, EVALUATIONS

05.08

Admissions management

Records relating to the establishment and general administration of student admissions policies and procedures: admissions policies (general and specific conditions of admission, quotas, capacity, etc.), information disseminated to colleges, admissions assistance, lists of applicants for admission, selection tests (questionnaires, interview grids, critical evaluations, French tests), statistical admissions reports and surveys, right to appeal follow-up mechanisms, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of the institution's official admissions policies and statistics, as well as samples of selection test questionnaires. Destruction of preliminary lists and records, lists of applicants for admission, records exchanged between the institution and colleges, and finalized selection tests.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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05 - STUDENT AFFAIRS / ADMISSIONS, REGISTRATIONS, EVALUATIONS

05.09

Registration management - Electronic records

Data used in recording and managing the institution's student registration process: information on students registered per academic session, enrolment by program, interuniversity agreements, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹		D ²

Notes: (D = Destruction R = Retention)

¹ Retention: 3 years following student's last registration. Files opened only for purposes of managing registration in a given academic session (for example, files of students who are not registered but whose files remain open) may be destroyed after the end of the academic session concerned.

² Destruction: Research value ensured by retention of the following paper records: official statistics, studies and reports on the student population (see schedule [05.04](#)).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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05 - STUDENT AFFAIRS / ADMISSIONS, REGISTRATIONS, EVALUATIONS

05.10

Registration management

Records relating to the establishment and general administration of the policies, procedures and processes of student registration: registration guides, enrolment lists and statements, registration statistics, etc. Official registration statistics are covered under a separate retention schedule (see schedule [05.04](#)).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		D
secondary [a]	other units concerned	1 year		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 3 years. Records created only for purposes of managing registration in a specific academic session may be destroyed immediately after the end of the academic session concerned.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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05 - STUDENT AFFAIRS / ADMISSIONS, REGISTRATIONS, EVALUATIONS

05.11

Advanced standing, course exemptions, recognition of earned and transferred credits

Records relating to the establishment and general administration of policies, procedures and processes governing advanced standings, course substitutions and exemptions, recognition of earned credits, mark equivalencies, conditions of credit transfers, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: As long as records are in effect or until replacement by a new version.

² Archives selection: Retention of official versions (and all updates) of policies, procedures, standards, directives and administrative procedures applied in managing the granting of advanced standings, course exemptions, recognition of earned credits and marks, credit transfers, etc.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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05 - STUDENT AFFAIRS / ADMISSIONS, REGISTRATIONS, EVALUATIONS

05.12

Students files – Electronic records

Data relating to the monitoring of students admitted and registered: general information about the student, academic progression, courses taken, results by course, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹		D ²

Notes : (D = Destruction R = Retention)

¹ Retention: 3 years following student's last registration.

² Destruction: Research value assured by retention of student files on paper (see schedule 05.15). If transcripts of student's marks are not transferred to his/her files, they should be retained in electronic form.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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05 - STUDENT AFFAIRS / ADMISSIONS, REGISTRATIONS, EVALUATIONS

05.13

Unsuccessful applicants

Records of applicants to a program of studies who were not accepted by the institution: applications for admission, file analysis forms, admissions committee decisions, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	D
Secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

¹ Retention: 1 month after the beginning of the next semester.

[] = medium ---> a = paper b = microfilm c =electronic d = audio-visual e = other

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05 - STUDENT AFFAIRS / ADMISSIONS, REGISTRATIONS, EVALUATIONS

05.14

Students admitted but not registered

Records of applicants to a program of studies admitted by the institution but who declined or did not register: applications, file analysis forms, admissions committee decisions, official acceptance notifications, letters of refusal, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		D
Secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

¹ Retention: 1 year. Files of foreign and post-graduate applicants may be retained for a longer period, according to the policy of the institution.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

05 - STUDENT AFFAIRS / ADMISSIONS, REGISTRATIONS, EVALUATIONS

05.15

Students admitted and registered

Records that document the progress of students (full-time, part-time, extension, etc.) from admission to departure from the institution: records and forms dealing with admission, registration, advanced credits, exemptions, course substitutions, graduate studies progression, evaluations and assignment of marks, results obtained, thesis or paper submission and evaluation processes, recommendations for granting of teaching licenses or certificates, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	Unit responsible	X ¹	3 years	R ²
Secondary [a]	Other units concerned	X ³		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after student's last registration.

² Archives selection: Retention of records documenting the student's provenance, academic progression, courses taken, results obtained and study programs completed.

³ Retention: 1 year after the student's last registration or the transfer of files to the registrar, according to the policies of the institution concerned

[] = medium ---> a = paper b = microfilm c =electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

05 – STUDENT AFFAIRS / ADMISSIONS, REGISTRATIONS, EVALUATIONS

05.17

Student evaluations management

Records relating to the collection, verification and recording of students' academic results: official student lists, lists of results by course (examinations, practicums, etc.), mark submission forms, transcripts, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	Unit responsible	2 years	3 years	D ¹
Secondary [a]	Other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

¹ Destruction: Research value assured by retention of student files on paper (see schedule [05.15](#)). If transcripts of student's marks are not transferred to his/her files, they should be retained in electronic form.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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05 – STUDENT AFFAIRS / ADMISSIONS, REGISTRATIONS, EVALUATIONS

05.18

Student discipline

Records relating to the establishment and general administration of policies and procedures to be applied in cases of fraud, plagiarism, falsification of records (signature, title, degree), etc.: records created when a student is brought before the institution's disciplinary committee, statements of infraction, charges, inquiries, complaints, summonses to appear, hearings, disciplinary committee decisions, appeals and penalties or final decisions implemented.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		R ²
secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

¹ Retention: 3 years after final appeal date, rejection or withdrawal of complaint (unfounded complaint).

² Archives selection: Retention of statistical data (if such exist) on cases in a given period. Destruction of other records.

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Records Retention Schedules for
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05 - STUDENT AFFAIRS / STUDENT SERVICES

05.19

Student services – Electronic records

Data used in the management of guidance services, academic and career information, learning assistance and support, locker rental and financial assistance, as well as special services for foreign students and students with disabilities.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹		D ²

Notes : (D = Destruction R = Retention)

- ¹ Retention: 3 years after the conclusion of an activity or service (for example, student departure, expiry of bursary, etc.).
² Destruction: Research value ensured by retention of the following paper records: reports and statistics documenting services provided, activities organized, resources available, student participation and evaluation of results (see schedules 05.20 to 05.37).

[] = medium ---> a = paper b = microfilm c =electronic d = audio-visual e = other

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Records Retention Schedules for
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05 - STUDENT AFFAIRS / STUDENT SERVICES

05.20

Student orientation and integration

Records relating the organization of orientation and integration activities for the institution's students: pre-registration activities, activities associated with the beginning of the academic year, individual student meetings, group student meetings (by program, faculty, level), etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	3 years		R ¹
secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retention of records documenting the holding and substance of orientation and integration activities, student participation and evaluation of results. Destruction of support records used in organizing activities.

[] = medium ---> a = paper b = microfilm c =electronic d = audio-visual e = other

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05 - STUDENT AFFAIRS / STUDENT SERVICES

05.21

Protection of student rights

Records relating to mechanisms for implementing and respecting the provisions of the charter (or declaration) of the rights of the institution's students or of academic, disciplinary or administrative regulations and policies: students' charter of rights, complaint resolution process, redress mechanisms, actions of the university ombudsman, complaint or consultation files, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: Until replacement of records by a new version (charter, policies, complaint redress or settlement mechanisms). Only the ombudsman can set rules for retention and access to files containing personal information.

² Archives selection: Retention of official versions (and all updates) of the charter (or declaration) of student rights and activities and statistics documenting the actions and general recommendations of the institution's ombudsman (such records must not contain any personal information).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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05 - STUDENT AFFAIRS / STUDENT SERVICES

05.22

Orientation, academic and career information services

Records relating to the organization and supervision of orientation activities and services (orientation clinics, psychometric tests) and academic and career-related information (defining of educational goals, research, consultations and workshops on trades, professions, study programs, etc.) offered to the institution's students.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	X ³		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after conclusion of activity or replacement of records by a new version.

² Archives selection: Retention of a complete copy of all psychometric tests (documents to be filled out by student, test administration and correction protocols). Retention of reports and statistics documenting services provided, activities organized, student participation and evaluation of results. Destruction of support records.

³ Retention: 1 year after conclusion of activity or until replacement of records by a new version.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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05 - STUDENT AFFAIRS / STUDENT SERVICES

05.23

Orientation, academic and career information services – Student files

Files consolidating all information on the users of the institution's orientation, academic and career-related information services: general information on users, interview summaries and notes, evaluation notes, questionnaires and diagnostic tests, case supervisor reports, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		D ²
secondary [a]	other units concerned	X ³		D

Notes : (D = Destruction R = Retention)

¹ Retention: 3 years after the last action or consultation.

² Destruction: Research value ensured by retention of general records (not containing any personal information) on orientation, academic and professional information services offered by the institution (see schedule [05.22](#)).

³ Retention: Until closing of file.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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05 - STUDENT AFFAIRS / STUDENT SERVICES

05.24

Learning assistance and support services

Records relating to the organization and supervision of the learning assistance and support activities and services provided to the institution's students: information meetings and workshops on effective studying, time management, note-taking, writing assignments, preparation for oral presentations, stress management, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	X ³		D

Notes : (D = Destruction R = Retention)

- ¹ Retention: 2 years after conclusion of activity or replacement of records by a new version.
² Archives selection: Retention of activity programs and reports and statistics documenting services provided, activities organized, student participation and evaluation of results. Destruction of support records.
³ Retention: 1 year after conclusion of activity or replacement of records by a new version.

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05 - STUDENT AFFAIRS / STUDENT SERVICES

05.25

Foreign student services and exchange programs

Records relating to the establishment, organization and supervision of student exchange programs and services provided to foreign students: memoranda of understanding and documentation on exchange programs (objectives, list of participating institutions, names and addresses of those in charge), lists of students participating in exchange programs, supervision of participation conditions and procedures (registration, assistance, insurance, trouble shooting, etc.).

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	X ³		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after conclusion of exchange program or replacement of record by a new version.

² Archives selection: Retention of memoranda, reports and statistics documenting operation and implementation of exchange programs and reception of foreign students. Destruction of support records.

³ Retention: until conclusion of program or replacement of record by a new version.

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05 - STUDENT AFFAIRS / STUDENT SERVICES

05.26

Foreign student services and exchange programs – Student files

Files consolidating all information about students and interns enrolled in exchange programs: general information on participants, academic file copies, correspondence (embassies, funding organizations, etc.), requests for one-time financial assistance, credit advance statements, insurance, reports on stay, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	D
secondary [a]	other units concerned	X ²		D

Notes : (**D** = Destruction **R** = Retention)

- ¹ Retention: 2 years after end of student's exchange.
² Retention: Until termination of student's exchange.

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05 - STUDENT AFFAIRS / STUDENT SERVICES

05.27

Services for students with disabilities

Records relating to the implementation and evolution of integration activities and services for students with disabilities: accessibility of buildings, oral and LSQ interpretation services, deployment of human resources (interpreters, note takers, escorts), materiel (wheelchairs, adaptation of buildings, furniture, laboratories), and specialized equipment (Braille printers, digitizers, visual readers, etc.), translation of Braille documents, enlargement of font sizes (course outlines, examinations), assistance approaching professors, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	X ³		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after conclusion of activity or replacement of document by a new version.

² Archives selection: Retention of program and activity reports and statistics documenting services provided, activities organized, student participation, and evaluation of results. Retention of samples of documents adapted to students with disabilities (large print, Braille, etc.). Destruction of support records.

³ Retention: Until conclusion of activity or replacement of record by a new version.

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05 - STUDENT AFFAIRS / STUDENT SERVICES

05.28

Services for students with disabilities – Student files

Files consolidating all information on students with disabilities attending the institution: general information on users, correspondence, special conditions, details of services required, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		D ²
Secondary [a]	other units concerned	X ³		D

Notes : (D = Destruction R = Retention)

¹ Retention: 3 years after termination of student's studies.

² Destruction: Research value ensured by retention of general records (not containing any personal information) on activities and services provided to the institution's students with disabilities (see schedule [05.27](#)).

³ Retention: Until end of student's stay.

[] = medium ---> a = paper b = microfilm c =electronic d = audio-visual e = other

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05 - STUDENT AFFAIRS / STUDENT SERVICES

05.29

Locker rental services

Records relating to the management of locker rental services for the institution's students: lists of lockers by building, procedures for opening lockers whose use is not authorized, padlock control and distribution procedures, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		D
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: Until replacement of records by a new version.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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05 – STUDENT AFFAIRS / STUDENT SERVICES

05.30

Locker rental services – Student files

Files consolidating all the information on students using the institution's locker rental services: general information on users, rental applications, locker rental forms, padlock borrowing forms, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		D
Secondary [a]	other units concerned	X ²		D

Notes : (D = Destruction R = Retention)

¹ Retention: 3 years after closing of files.

² Retention: Until closing of files.

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05 - STUDENT AFFAIRS / STUDENT SERVICES

05.31

Sports teams

Records relating to the organization and development of the institution's sports teams: recruitment, training, games, publicity, sponsors, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of records documenting the creation, composition, activities and achievements (particularly trophies won) of the institution's sports teams.

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05 - STUDENT AFFAIRS / STUDENT SERVICES

05.32

Financial assistance services

Records relating to the establishment and general administration of the financial aid services offered to the institution's students: dissemination of information on loans and bursaries (correspondence, documentation, statistics), lists of grant organizations, lists of applicants, bursary students, bursary applications rejected, support measures for students in the process of obtaining financial assistance needed to continue their studies, budget planning advice, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	4 years	R ¹
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retention of program and activity summary reports and statistics documenting services provided, student participation and financial assistance awarded or obtained. Destruction of support records.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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05 - STUDENT AFFAIRS / STUDENT SERVICES

05.33

Institution loans and bursaries

Records relating to the management of loans and bursaries awarded by the institution: management of applicants, operations of selection committees, lists and profiles of bursary winners, statistics, correspondence, financial contingency contracts, credit advance policies, financial assistance to doctoral students, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	4 years	R ¹
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retention of programs, reports, statistics, lists of bursary winners, as well as records reflecting the institution's loan and bursary grant policies. Destruction of support records.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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05 - STUDENT AFFAIRS / STUDENT SERVICES

05.34

Government loans and grants

Records relating to the management of loan and grant programs operated by various government organizations: distribution lists, loans and grants not awarded, publicity, statistics, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years		R ¹
secondary [a]	other units concerned	1 year		D

Notes : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of recapitulative statistics documenting the awarding of government loans and grants to institution students. Destruction of support records.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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05 - STUDENT AFFAIRS / STUDENT SERVICES

05.35

Loans and grants awarded by outside organizations

Records relating to the management of loans and grants awarded by various external organizations: lists of grant applicants, acceptance notifications, correspondence concerning issuing of cheques, lists of grant winners, lists of unsuccessful applicants, statistics, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years		D ¹
secondary [a]	other units concerned	1 year		D

Notes : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of recapitulative statistics documenting the awarding of loans and grants by outside organizations to institution students. Destruction of support records.

[] = medium ---> a = paper b = microfilm c =electronic d = audio-visual e = other

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05 - STUDENT AFFAIRS / STUDENT SERVICES

05.36

Financial aid services – Student files

Files consolidating information on students applying for financial assistance (loans, bursaries, grants) from the institution, from government agencies or from outside organizations: general information on applicants, financial, social and family situations, school files, letters of recommendation, examiners' reports, nature and terms/conditions of assistance granted, means of repayment, discharge, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	4 years	R ¹
secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retention of files of recipients of major scholarships.

[] = medium ---> a = paper b = microfilm c =electronic d = audio-visual e = other

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05 - STUDENT AFFAIRS / STUDENT SERVICES

05.37

Job-search services

Records relating to the management of job-search assistance services for the institution's students and graduates: consultation days for reviewing curricula vitae, preparatory employment interview counselling, consultations of positions-available job-banks, recruitment activities, information booths, talks, information meetings on job placement, curriculum vitae banks, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹		R ²
secondary [a]	other units concerned	X ³		D

Notes : (**D** = Destruction **R** = Retention)

- ¹ Retention: 2 years after conducting activity or replacement of record by a new version. Retain curricula vitae 1 year.
² Archives selection: Retention of programs, activity reports and statistics documenting students' use of student job-placement assistance services.
³ Retention until activity is held or replacement of record by a new version.

[] = medium ---> a = paper b = microfilm c =electronic d = audio-visual e = other

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Quebec Academic Institutions

05 - STUDENT AFFAIRS / STUDENT ACTIVITIES AND ORGANIZATIONS

05.38

Student activities

Records relating to the organization of activities to encourage participation and socializing by the institution's students: encounter activities within a program of studies, orientation activities organized by students at the beginning of the academic year, recreational activities, creation and development of professional contact networks, evening get-togethers, noon-hour discussion groups, conference days, student newsletters and newspapers, student-participation recognition policies (statement, synthesis reports, awarding of credits for participation), etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retention of promotional materials and reports documenting student activities organized with institution support (for example, orientation activities, festivals etc.). Destruction of support records (student newsletters and newspapers are not preserved in the institution's archives but may be retained in the private archives collections of the student organizations that produced them, if such exist).

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05 - STUDENT AFFAIRS / STUDENT ACTIVITIES AND ORGANIZATIONS

05.39

Intervarsity competitions

Records relating to the participation of institution students in intervarsity competitions – academic, scientific, artistic, athletic, law-related, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retention of records documenting the participation of the institution's students in intervarsity competitions and the results obtained.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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05 - STUDENT AFFAIRS / STUDENT ACTIVITIES AND ORGANIZATIONS

05.40

Student organizations

Records relating to the institution's students' associations, organizations and groups: requests for recognition or accreditation, charters, executives, membership lists, structures (relations with similar organizations in other universities), etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after termination of recognition or accreditation.

² Archives selection: Retention of records documenting the creation, recognition and achievements of associations, organizations and groups of institution students. Destruction of support records (for example, forms and correspondence relating to the collection of dues).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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05 - STUDENT AFFAIRS / GRADUATES

05.41

Convocation

Records relating to the organization of convocation ceremonies for the institution's graduates: lists of graduates by sector, presentation speeches, protocols, albums, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

¹ Retention: 1 year after convocation ceremonies.

² Archives selection: Retention of official institution publications. Destruction of support records.

[] = medium ---> a = paper b = microfilm c =electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

05 - STUDENT AFFAIRS / GRADUATES

05.42

Graduates - Electronic records

Data used to identify degrees conferred on graduates and to maintain contact with the institution's graduates: personal data, degree obtained and date, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [c]	unit responsible	X ¹		R

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: Until the 100th anniversary of graduate's birth.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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05 - STUDENT AFFAIRS / GRADUATES

05.43

Graduates

Records relating to the identification of graduates and the institution's relations with its alumni: graduate lists and logs, reports and statistics on graduates, alumni association files (sectoral or program associations), etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retention of cumulative logs of graduates (or equivalent) and records documenting the creation, recognition and achievements of associations and groups of alumni. Destruction of support records.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

05 - STUDENT AFFAIRS / GRADUATES

05.44

Alumni activities

Records relating to the organization of activities and services to encourage involvement, participation and social activities of institution alumni: alumni services (library, Internet, courses, seminars, watches, credit cards, insurance, etc.), exchange activities between alumni and students of the same department, recreational activities, reunions and homecomings, lunch-hour discussions, one-day conferences, alumni newsletters and magazines, involvement of alumni in the institution's fundraising committees and campaigns, etc.

Copy	Unit	Active	Semi-active	Inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retention of promotional materials, publications and reports documenting alumni activities and types of services offered by the institution. Destruction of support records (alumni association newsletters and magazines are not preserved in the institution's archives, but may be retained in the private archives collections of the alumni associations that produced them).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

06 - COMMUNITY SERVICES / COMMUNITY SERVICES

06.01

Community services – Electronic records

Data used in the management of health services, legal assistance, and sports, food and social and cultural services offered to students of the institution and members of the surrounding community.

copy	unit	active	Semi-active	inactive
primary [c]	unit responsible	X ¹		D ²

Notes: (**D** = Destruction **R** = Retention)

¹ Retention: As long as service is provided or 5 years after last file entry.

² Destruction: Research value ensured by retention of the following paper records: programs, protocols, contracts, agreements, reports and statistics documenting services provided, activities organized, resources available, user participation and evaluation of results obtained (see schedules 6.02 to 06.17).

[] =medium --->a = paper b = microfilm c = electronic d = audio-visual e =other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

06 - COMMUNITY SERVICES / COMMUNITY SERVICES

06.02

Community service projects

Records dealing with the organization of educational, research and consultation activities provided by the institution to the surrounding community: correspondence, protocols, contracts, agreements, activities and programs, promotion and marketing of activities, reports, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years after termination of project.

² Archives selection: Retention of correspondence, programs, protocols, contracts, agreements, reports and statistics providing descriptions and documenting principal achievements and participation obtained. Destruction of support records (registrations, financial management, etc).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e =other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

06 - COMMUNITY SERVICES / HOUSING SERVICES

06.03

Housing services

Records dealing with the management of student housing services: policies and regulations, reference banks of accommodations and rooms for students to rent, sublet or share, university residences, refrigerator rentals, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹		R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: Until replacement of records by a new version. Retain records dealing with the management of subsidiary services available to clients of university residences (furniture rentals, etc) for 3 years.

² Archives selection: Retention of policies and regulations, inventories of residences owned by the institution, and reports and statistics documenting student use. Destruction of support records.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e =other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

06 – COMMUNITY SERVICES / HOUSING SERVICES

06.04

Housing services - User files

All records on users of the institution's housing services: general user information, rental requests, rental contracts or renewals, correspondence with landlords and departure notifications.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹		D
secondary [a]	other units concerned	X ²		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 3 years after closing of file.

² Retention: Until closing of file.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e =other

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Records Retention Schedules for
Quebec Academic Institutions

06 – COMMUNITY SERVICES / HEALTH SERVICES

06.05

Health services

Records dealing with the management of health services provided to the institution's students and the surrounding community: planning and organization of health services (preventive and screening activities, medical, psychological, psychiatric, dental and optometry clinics, etc.) and psychological assistance and information services (information centres, workshops and individual or group consultations).

Copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	8 years	R ²
secondary [a]	other units concerned	X ³		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years after conducting activity or replacement of records by new version.

² Archives selection: Retention of programs, activity reports and statistics documenting services provided or activities organized, client participation and evaluation of results obtained. Destruction of support records.

³ Retention: Until termination of activity or replacement of records by new version.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

06 – COMMUNITY SERVICES / HEALTH SERVICES

06.06

Health services - User files

All records on users of the health services provided by the institution (medical, psychological, psychiatric, dental and optometry clinics, etc): general user information, case histories, examinations, diagnoses, care prescribed, progress reports, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	X ²	D ³
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: In the office of the practitioner concerned, 2 years after last file entry.

² Before user files are transferred to archives, practitioners should provide archives with specific and detailed instructions stating the persons (functions) who should have access to files and the terms and conditions of retention and handling, particularly retention periods, which cannot be less than 5 years in compliance with the legal requirements for retention of practitioner records.

³ Destruction according to the terms and conditions of the practitioner's instructions. Destruction where there are no instructions or it is impossible to get instructions from the practitioner. Institutions that deem it appropriate to retain certain files for their research value may select samples or specimens on condition that the files are not personal and with the consent of the practitioner.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

06 - COMMUNITY SERVICES / LEGAL ADVICE SERVICES

06.07

Legal advice services

Records dealing with the management of legal services provided to the institution's students and the surrounding community: planning and organization of legal consultation services (legal clinics), legal assistance and information (kiosks, workshops and individual or group consultations).

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	8 years	R ²
secondary [a]	other units concerned	X ³		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after conducting activity or replacement of records by new version.

² Archives selection: Retention of programs, activity reports and statistics documenting services provided, activities organized, client participation and evaluation of results. Destruction of support records.

³ Retention: Until conclusion of activity or replacement of records by new version.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

06 – COMMUNITY SERVICES / LEGAL ADVICE SERVICES

06.08

Legal advice services – User files

All records on users of the institution's legal advice services (legal clinics): general user information, consultation summaries, legal correspondence, counselling, referrals, resolutions, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	X ²	D ³
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: In practitioner's office 2 years after last file entry.

² Before user files are transferred to archives, practitioners should provide archives with specific and detailed instructions stating the persons (functions) who should have access to files and the terms and conditions of retention and handling, particularly retention periods, which cannot be less than 5 years in compliance with the legal requirements for retention of practitioner records.

³ Destruction according to the terms and conditions of the practitioner's instructions. Destruction where there are no instructions or it is impossible to get instructions from the practitioner. Institutions that deem it appropriate to retain certain files for their research value may select samples or specimens on condition that the files are not personal and with the consent of the practitioner.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

06 - COMMUNITY SERVICES / ATHLETICS

06.09

Athletics

Records dealing with the management of sports and athletic programs and facilities available to the student population and surrounding community: recruitment and registration of members, planning and organization of activities (free or organized activities, sports leagues, training programs), utilization (reservations, use) of facilities (gymnasiums, training rooms, swimming pools, outdoor recreational areas, outdoor sports fields, etc.), sports equipment (reservations, loans).

copy	unit	Active	semi-active	inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of programs, activity reports and statistics documenting use and users of sports services.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e =other

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Records Retention Schedules for
Quebec Academic Institutions

06 - COMMUNITY SERVICES / ATHLETICS

06.10

Athletics - User files

All records on users of the institution's sports and athletic services: general user information, registration forms, registration fee receipts, physical evaluation forms, training progress monitoring forms, personalized training programs, etc.

copy	Unit	active	semi-active	Inactive
primary [a]	unit responsible	3 years		D
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: Until closing of file.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e =other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

06 – COMMUNITY SERVICES / FOOD SERVICES

06.11

Food services

Records dealing with the management of food services provided to the institution's clients (restaurants and cafeterias, catering and beverage services, automatic food-dispensing machines, etc.): food supplies inventory forms, menus, recipes, meal and reception organization, cash register tapes, etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	D
secondary [a]	other units concerned	2 years		D

N o t e s : (D = Destruction R = Retention)

¹ Retention: 2 years or as long as records are in effect.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

06 - COMMUNITY SERVICES / FOOD SERVICES

06.12

Food services - User files

All records on users of the institution's food services: general user information, order forms, special requirements, reception and function reports, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	D
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

06 - COMMUNITY SERVICES / SOCIAL AND CULTURAL SERVICES

06.13

Social and cultural services

Records dealing with the management of social and cultural services available to the institution's clients: user registration procedures, planning and organization of social and cultural activities (outreach, educational, social and special programs, activities of artistic, cultural and scientific groups), etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retention of programs, activity reports and statistics documenting the organization and content of social and cultural activities.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

06 - COMMUNITY SERVICES / SOCIAL AND CULTURAL SERVICES

06.14

Social and cultural services - User files

All records on users of social and cultural services offered by the institution: general user information, registration forms, registration fee receipts, etc.

copy	unit	Active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	D
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e =other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

06 - COMMUNITY SERVICES / SOCIAL AND CULTURAL SERVICES

06.15

Exhibitions

Records dealing with the organization and presentation of exhibitions by the institution or one of its components: lists of works, explanatory texts, correspondence, installation plans, depictions of works exhibited, insurance contracts, catalogues, press releases, invitations, etc.

copy	unit	Active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D

N o t e s : (D = Destruction R = Retention)

¹ Retention: 2 years following conclusion of exhibition.

² Archives selection: Retention of reports and statistics on exhibitions, catalogues (including lists and depictions of works shown), specimens of invitations and posters, texts of speeches given at openings, contracts, explanatory texts, press releases and significant correspondence. Destruction of support records.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e =other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

06 - COMMUNITY SERVICES / CONFERENCES, SYMPOSIUMS, CHARITABLE ACTIVITIES

06.16

Conferences and symposiums

Records relating to conferences and symposiums held or organized by the institution or one of its components: correspondence, programs, conference proceedings, lists of participants, (posters, financial records, etc. Records dealing with the organization of and participation in outside conferences and symposiums by members of the institution are covered in a separate retention schedule (see schedule [01.11](#)).

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retention of records significantly documenting the organization and holding of conferences and symposiums according to the nature and importance of subject matter and in light of the institution's mission (organizing committee minutes, programs, conference proceedings, financial statements, conference documents, lists of participants). Destruction of support records (reservation of rooms and equipment, logistical and financial management, etc).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

06 - COMMUNITY SERVICES / CONFERENCES, SYMPOSIUMS, CHARITABLE ACTIVITIES

06.17

Charitable activities

Records dealing with charitable activities involving the institution and members of the university community: charitable fundraising (e.g. United Way), Christmas hampers, Red Cross blood-donor clinics, canvassing and collecting (money, clothing, etc.) for underprivileged families, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	2years		D

N o t e s : (D = Destruction R = Retention)

¹ Archives selection: Retention of significant correspondence and reports documenting charitable activities involving the institution and their results. Destruction of support records connected with logistical organization of activities.

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e =other

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Records Retention Schedules for
Quebec Academic Institutions

07 - TEACHING / TEACHING ORGANIZATION

07.01

Organization of teaching activities – General

Records dealing with the organization, structure and operation of teaching: organizational structures (creation and organization of faculties, schools, departments, etc.), program organization (principles and regulations governing admission, registration, student evaluation and the issuing of degrees), general program and course administration, etc.

copy	Unit	active	Semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years after closing of file or replacement of records by a new version.

² Archives selection: Retention of records documenting general teaching administration. Destruction of support records.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

07 - TEACHING / TEACHING ORGANIZATION

07.02

Programs - Electronic records

Data used in the description and evaluation of the institution's educational programs: program banks (indexes), program activities (descriptions of required activities within each program), banks of questions used in program evaluations.

copy	Unit	Active	semi-active	inactive
primary [c]	unit responsible	X ¹		R

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 5 years after discontinuing a version of a program or 2 years after a program evaluation.

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07 - TEACHING / TEACHING ORGANIZATION

07.03

Programs: Feasibility, planning and implementation

Records dealing with the development of the institution's educational programs: program feasibility and development files (adopted or not adopted), program approval certifications, program commencement authorizations, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Retention: Files of adopted projects, 2 years after major modification or cancellation and complete cessation of a program's activities. Retention of files of projects not adopted: for 2 years following final decision.

² Archives selection: Retention of records from beginning of program creation process, plans and recapitulative reports documenting program planning and development processes (exploration and development committees). Destruction of support records.

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07.04

Programs: General evaluations and changes

Records dealing with the evaluation of and changes to the institution's educational programs: periodic evaluation plans, evaluation files (consultations with program directors, professors and students, evaluation indicators), files of program modifications (minor revisions, major changes), etc.

copy	unit	Active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after program evaluation or modification.

² Archives selection: Retention of recapitulative reports documenting general program evaluations and changes. Destruction of support records.

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07 - TEACHING / TEACHING ORGANIZATION

07.05

Programs: Financial evaluations

Records dealing with the cost evaluation of the institution's programs: cost/benefit studies, resources required, revenues generated, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years after financial evaluation of program.

² Archives selection: Retention of recapitulative reports documenting costs of various programs. Destruction of support records.

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07 – TEACHING / TEACHING ORGANIZATION

07.06

Program indexes

Records dealing with the nomenclature, classification systems and identification of the institution's programs: lists of official program titles, degrees and corresponding abbreviations, breakdowns of programs by teaching and research fields, etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years after replacement of records by a new version.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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07 – TEACHING / TEACHING ORGANIZATION

07.07

Undergraduate program management

Records dealing with the general administration of each of the institution's undergraduate programs: lists of program directors, objectives, general and special admission and registration requirements, development (reports on minor and major modifications), individual programs, transferability or compatibility with other programs, lists of equivalent programs in other institutions, admission and registration statistics, tracking of success, failure and drop-out rates, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after termination of program and complete cessation of its activities.

² Archives selection: Retention of reports, statistics and all significant records documenting the program's development. Destruction of support records or records whose data are available in a more comprehensive record.

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07.08

Graduate program management

Records dealing with the general administration of each of the institution's graduate programs: program histories, correspondence, lists of program directors, objectives, general and special admission and registration requirements, development (reports of minor and major changes), individual programs, transferability or compatibility with other programs, lists of equivalent programs in other institutions, admission and registration statistics, tracking of success, failure and drop-out rates, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after termination of program and complete cessation of its activities.

² Archives selection: Retention of reports, statistics and all records significantly documenting the program's evolution. Destruction of support records or records whose data are available in a more comprehensive record.

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07 - TEACHING / TEACHING ORGANIZATION

07.09

Continuing education programs

Records dealing with the general administration of each of the institution's continuing education programs (continuing professional education, adult education): program histories, correspondence, lists of program directors, general and special admission and registration requirements, development, transferability or compatibility with other programs, admission and registration statistics, tracking of success, failure and drop-out rates, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after termination of program and complete cessation of its activities.

² Archives selection: Retention of reports, statistics and all significant records documenting the program's evolution. Destruction of support records or records whose data are available in a more comprehensive record.

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07 - TEACHING / TEACHING ORGANIZATION

07.10

Distance education programs

Records dealing with the general administration of each of the institution's distance education programs (televised courses, telephone tutoring, correspondence courses, Internet courses, etc.): program histories, correspondence, operations, lists of program directors, objectives, general and special admission and registration requirements, transferability or compatibility with other programs, admission and registration statistics, tracking of success, failure and drop-out rates, etc.

copy	Unit	Active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years after termination of program and complete cessation of all its activities.

² Archives selection: Retention of reports, statistics and all significant records documenting the program's evolution. Destruction of support records or records whose data are available in a more comprehensive record.

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07.11

Special programs

Records dealing with the general administration of each of the institution's special programs (seminars, workshops, non-credit activities or where the number of credits exceeds the requirement): program histories, correspondence, lists of program directors, objectives, general and special admission and registration conditions, development, transferability or compatibility with other programs, registration statistics, tracking of success, failure and drop-out rates, etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after termination of program and complete cessation of all its activities.

² Archives selection: Retention of reports, statistics and all significant records documenting the program's evolution. Destruction of support records or records whose data are available in a more comprehensive record.

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07 – TEACHING / TEACHING ORGANIZATION

07.12

Extension training programs

Records dealing with the general administration of the institution's extension training activities (seminars, workshops, non-credit activities or where the number of credits exceeds the requirement, individual programs): course programs and educational activities, correspondence, costs, registration management, documentation sent to participants, records dealing with the hiring and payment of educators and speakers, participation certification management, reports on participation, satisfaction evaluations, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	2 years		D

N o t e s : (D = Destruction R = Retention)

¹ Archives selection: Retention of programs, course outlines, reports and statistics documenting the organization of and participation in extension activities. Retention of official records certifying participants' success and results obtained (continuing education credits awarded, participation confirmations) and sample certificates of participation (for each activity). Destruction of copies and originals of unclaimed certificates, support records relating to management of budget for services, course notes and materials (texts, overhead transparencies, etc.) supplied by instructors or lecturers.

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07 - TEACHING / TEACHING ORGANIZATION

07.13

Off-campus teaching

Records dealing with the general administration of the institution's off-campus teaching services: off-campus course programs and educational activities, memorandums of agreement with other institutions (premises, resources), correspondence, operation of services, admission and registration statistics, etc.

copy	Unit	active	semi-active	inactive
Primary [a]	unit responsible	2 years	5 years	R ¹
Secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retention of significant records documenting the development of the institution's off-campus teaching services. Destruction of support records or records whose data are available in a more comprehensive record.

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07 – TEACHING / TEACHING ORGANIZATION

07.14

Program accreditation and certification

Records relating to the accreditation and certification of certain of the institution's programs (recognition by a professional body, college or corporation of the program's standards and the professional title associated with it): correspondence, accreditation certificates, etc.

copy	unit	active	semi-active	inactive
Primary [a]	unit responsible	2 years	5 years	R
Secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

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07 - TEACHING / TEACHING MANAGEMENT

07.15

University / Academic timetable

Records describing and timetabling the main stages of the academic year.

copy	Unit	active	semi-active	inactive
Primary [a]	unit responsible	2 years		R ¹
Secondary [a]	other units concerned	2years		D

N o t e s : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of final versions of university calendar. Destruction of working records and preliminary versions.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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07 – TEACHING / TEACHING MANAGEMENT

07.16

Academic sessions organization - Electronic records

Data used in the organization and management of the activities of the institution's academic sessions: required courses, target mean class sizes, assignment of teaching duties and course loads, supervision of teaching assistants, master timetables (course designations, schedules, professors' names, locations, times, numbers of students, etc.

copy	Unit	active	semi-active	inactive
primary [c]	unit responsible	2 years		D ¹

Notes : (**D** = Destruction **R** = Retention)

¹ Destruction: Research value ensured by retention of the following paper records: university calendars, (schedule [07.15](#)), course accommodation capacities (schedule [07.18](#)), target mean class sizes (schedule [07.19](#)), master timetables (schedule [07.22](#)), etc.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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07 – TEACHING / TEACHING MANAGEMENT

07.17

Academic sessions organization

Records dealing with the general administration and organization of the institution's academic sessions: required course, target mean class sizes, lists of teaching assignments and course loads, lists of teaching assistants, master timetables, correspondence, timetable changes, statistics, etc.

copy	Unit	Active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	D
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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07.18

Course accommodation capacities

Records relating to the number of students admitted to a program or registered in a course section: evaluation of accommodation capacity by program and course section, lists of maximum student numbers by course section, capacity increase or reduction rationales, correspondence, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	2 years		D

N o t e s : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of records documenting capacity evaluations, increases or reductions and the institution's policies and practices governing student numbers (unless the same information is available in admissions policy records, which are covered under schedule [05.08](#)). Destruction of support records.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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07 - TEACHING / TEACHING MANAGEMENT

07.19

Mean class sizes

Records dealing with the setting of mean numbers of students per class by course section for each program and level.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	R
secondary [a]	other units concerned	2 years		D

N o t e s : (D = Destruction R = Retention)

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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07 – TEACHING / TEACHING MANAGEMENT

07.20

Course loads

Records dealing with the allocation of teaching assignments among faculty members in a given session: course section tables, teaching duties, lists of teaching assignments, correspondence, etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	D
secondary [a]	other units concerned	2 years		D

N o t e s : (**D** = Destruction **R** = Retention)

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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07 - TEACHING / TEACHING MANAGEMENT

07.21

Course load allocation

Records dealing with allocation of course loads in a given session (postings, candidates, recommendations, assignments): course load eligibility lists, course load allocation recommendations, course load distribution, lists of course load assignments, lists of courses cancelled or withdrawn, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	D
secondary [a]	other units concerned	2 years		D

N o t e s : (**D** = Destruction **R** = Retention)

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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07 – TEACHING / TEACHING MANAGEMENT

07.22

Course master timetables

Records listing the designation, title, section numbers, schedules, locations and number of student places available for each of the courses offered in a given session.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	2 years		D

N o t e s : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of official version of master timetable. Destruction of preliminary versions and working files.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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07 – TEACHING / TEACHING MANAGEMENT

07.23

Courses - Electronic records

Data used in the management of the institution's courses: activity and course indexes (course subject, number and title, number of credits, prerequisites, etc.), course descriptions for all programs, changes, additions, withdrawals of courses, etc.

copy	unit	Active	semi-active	inactive
primary [c]	unit responsible	X ¹		D ²

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 10 years after termination or modification of course.

² Destruction: Research value ensured by retention of the following paper records: course calendars, files, outlines, assigned material and notes (see schedules 07.24 to 07.28).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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07 - TEACHING / TEACHING MANAGEMENT

07.24

University calendars

Records containing course descriptions for all programs offered by the institution in a given academic year: calendars, changes, additions, course withdrawals, correspondence, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	2 years		D

N o t e s : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of the official version (and all updates) of university calendars. Destruction of working records.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
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07 - TEACHING / TEACHING MANAGEMENT

07.25

Course management - General

Records dealing with the general administration of all courses offered by the institution: objectives, general and special registration requirements, evolution (reports on minor and major changes in course content), transferability or compatibility with other courses, list of course prerequisites, registration statistics, etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retention of significant records documenting the development of course content. Destruction of support records or records whose data are available in a more comprehensive record.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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07 - TEACHING / TEACHING MANAGEMENT

07.26

Course management

Records used in the management of each of the institution's courses: course outlines, student lists, exercises, assignment and examination questions and work returned, orders and sales of course notes, correspondence, etc.

copy	unit	active	semi-active	inactive
primary [a]	Unit responsible	2 years	5 years	R ¹
secondary [a]	Other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retention of records documenting course organization (descriptions, course outlines, bibliographies, records used in student evaluations, etc.). Destruction of support records (preliminary student lists, requests for mark changes, etc).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

07 - TEACHING / TEACHING MANAGEMENT

07.27

Course outlines

Records containing the designation, title, description, content, general and specific objectives, schedule and evaluation procedures for each of the institution's courses.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	R
secondary [a]	other units concerned	2 years		D

N o t e s : (**D** = Destruction **R** = Retention)

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

07 - TEACHING / TEACHING MANAGEMENT

07.28

Course material and notes

Documents handed out or sold to students by professors for course use and disseminated by photocopy, print, the Internet, etc: detailed outlines for each course, explanatory notes, exercises, copies of reference texts, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	2 years		D

N o t e s : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of compilations of material whose contents document course methodology and content in an original and substantive manner. Destruction of collections of photocopied texts (extracts of books and journals).

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

07 - TEACHING / TEACHING MANAGEMENT

07.29

Laboratories, seminars, overview activities

Records used in the management of the institution's laboratories, seminars and overview activities: outlines, student lists, exercises, examination questions and results, reports, correspondence, etc.

copy	unit	Active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	2 years		D

N o t e s : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of records documenting the organization of laboratories, seminars and overview activities: descriptions, activity plans, records used in student evaluations, etc. Destruction of support records (activities organization, room and equipment reservations, etc).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

07 - TEACHING / TEACHING MANAGEMENT

07.30

Practicums, internships and co-ops

Records used in the organization and management of practicums, internships and co-op programs offered to institution students: handbooks, contracts, placement data banks, management of practicums, internships and co-ops (projects, statements of purpose, requests for admission, placement confirmations, project summaries, procedures, activities planned, evaluation methods, etc.)

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	2 years		D

Notes : (D = Destruction R = Retention)

¹ Archives selection: Retention of significant records summarizing the organizational methodology of practicums, relations established between the institution and practicum placement situations, placement statistics, etc. Destruction of support records used in organizing practicums, co-ops and internships.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

07 - TEACHING / TEACHING MANAGEMENT

07.31

Student trainee files

All records pertaining to students undertaking a practicum, internship, co-op or other training period within the context of their study program: statement of purpose forms, financial commitments, placement confirmations, contracts, correspondence, evaluation forms completed by supervisors, reports, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	D ¹
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **C** = Retention)

¹ Destruction: Depending on institution policy, certain records may be transferred to the student's file (see schedule [05.15](#)).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

07 – TEACHING / TEACHING MANAGEMENT

07.32

Academic pedagogy

Records dealing with the planning, development and use of various teaching methodologies and tools: pedagogical development plans (objectives, funds, etc.), specific teaching and educational projects, reports on the development and use of teaching media, lists of teaching materials, correspondence, etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	3 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: As long as records are in effect.

² Archives selection: Retention of reports, studies and statistics documenting the development of the institution's pedagogical methodologies.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
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07 – TEACHING / TEACHING MANAGEMENT

07.33

Teaching evaluations - Electronic records

Data used to manage evaluation of the teaching provided by the institution's professors and lecturers: course designation, section number, instructor's name, evaluation criteria, number of respondents, number of questionnaires, results by criterion, overall results, etc.

copy	unit	active	semi-active	inactive
primary [c]	unit responsible	X ¹	5 years	D

N o t e s : (**D** = Destruction **R** = Retention)

¹ Retention: 1 session after compilation of results.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
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07 - TEACHING / TEACHING MANAGEMENT

07.34

Teaching evaluations

Records dealing with evaluation of the teaching provided by the institution's professors and lecturers: questionnaires, evaluation procedures, individual reports and overall results.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years after compilation of results for a given session.

² Archives selection: Retention of result compilations and a specimen questionnaire.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

07 – TEACHING / STUDENT EVALUATION

07.35

Grading Systems/Evaluation Methodology

Records dealing with the establishment and application of measures and criteria for the evaluation of student achievement: grading systems, methodologies, techniques and general and specific criteria used in student evaluations, teacher-student evaluation agreements, examination invigilation procedures, etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D

N o t e s : (D = Destruction R = Retention)

¹ Retention: 2 years or as long as records are in effect (criteria, procedures, etc).

² Archives selection: Retention of techniques, criteria and general methodological guidelines. Destruction of records associated with student evaluation in specific courses, as integrity of research is ensured by retention of course outlines documenting specific evaluation procedures (see schedule [07.27](#)).

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

07 - TEACHING / STUDENT EVALUATIONS

07.36

Tutoring

Records dealing with organized activities to help students prepare to take a degree, an exam or a competition: programs, teaching materials, correspondence, lists of resource persons and participants, etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	R ¹
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of programs and reports substantively documenting tutoring activities conducted and student participation. Destruction of support records.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
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07 - TEACHING / STUDENT EVALUATIONS

07.37

Examinations and tests

Records used in evaluating student levels of learning and knowledge acquisition: examination and test questions, examination papers and workbooks (completed by students), answer keys, marking criteria, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	X ²	R ³

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: Completed examination papers and workbooks according to retention policy of each institution. Retain examination questions, answer keys and marking criteria for 2 years.

² Retention: 5 years for examination questions, answers and marking criteria (destruction of examination papers and workbooks).

³ Archives selection: Retention of examination questions, answers and marking criteria.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
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07 – TEACHING / STUDENT EVALUATIONS

07.38

Student work

Work done by students as part of their courses, practicums, laboratories and overview activities and used in the evaluation of their learning. Dissertations and theses are covered under a separate retention schedule (see schedule [07.40](#)).

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹		D ²

N o t e s :

(**D** = Destruction **R** = Retention)

¹ Retention: Until expiry of deadline for reviewing marks (according to the internal policies of each institution). Work may subsequently be returned to students (according to institution policy) or retained for 1 year.

² Destruction: Unclaimed work may be transferred to one of the institution's records centres specializing in the discipline concerned (for example, student work in design, film, music, theatre, etc.) to the extent that regulations provide that, upon submission, ownership resides in the institution and is deemed to give the institution authorization to use or publish, for pedagogical, non-commercial purposes, work of all types submitted to professors.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

07 – TEACHING / STUDENT EVALUATION

07.39

Dissertations and theses - Electronic records

Data used in supervising the submission, evaluation and cataloguing of master's theses and doctoral dissertations: student name, file number, thesis or dissertation number and title, thesis committee, research field, date of deposit, etc.

copy	Unit	active	semi-active	inactive
primary [c]	unit responsible	X ¹		R

Notes : (D = Destruction R = Retention)

¹ Retention: As long as the system exists (data are updated regularly and are usually cumulative).

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

07 - TEACHING / STUDENT EVALUATION

07.40

Dissertations and theses

Work done by students as part of a master's or doctoral program (copies of theses and dissertations) and, where required, forms signed by students authorizing reproduction and dissemination.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	1 year		R
secondary [a]	other units concerned	1 year		D

Notes : (D = Destruction R = Retention)

[] = medium --->a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

07 – TEACHING / STUDENT EVALUATION

07.41

Diplomas and certificates

Records dealing with the issuing of diplomas and certificates to students who have completed their program of study: specimens of diplomas and certificates, schedules and procedures for issuing diplomas, inquiries regarding the awarding of diplomas, registers of diploma formats and signatories, unclaimed diplomas, special requests regarding diplomas (copies, translations, certifications), etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years or until replacement of records by a new version. Destruction of unclaimed diplomas after 2 years.

² Archives selection: Retention of schedules and procedures for issuing diplomas, specimens of each type of diploma or certificate (different formats or presentations). Destruction of support records (diploma orders, requests for copies, translations, certifications, etc).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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07 – TEACHING / COOPERATION - TEACHING

07.42

Cooperation - Teaching

Records dealing with teaching cooperation and partnership activities and strategic alliances involving the institution and different public or private organizations, national and international (teaching and research organizations, private organizations and corporations, etc): correspondence, agreements, memoranda, protocols and other documents relating to proposed affiliations, extension programs, cooperative teaching, jointly managed programs, etc.

Copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after termination of cooperation agreement.

² Archives selection: Retention of significant records documenting the nature, objectives, and results of cooperative teaching agreements involving the institution.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
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07 – TEACHING / COOPERATION – TEACHING

07.43

Cooperating organizations - Teaching

Records documenting exchanges and relations maintained with various cooperating organizations with an interest in the institution's teaching: correspondence, cooperative programs, framework agreements, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years or until expiry of the cooperation agreement.

² Archives selection: Retention of framework agreements and significant correspondence documenting the nature of the relations maintained by the institution with the various cooperating organizations.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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07 – TEACHING / COOPERATION – TEACHING

07.44

Participating professors - Teaching

Records documenting the profiles and achievements of professors participating in cooperative teaching activities involving the institution: formal record of participation in cooperative projects, reports, correspondence and any other records containing the names of co-operating organizations, departments, project titles, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ³		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after departure of the participating professor.

² Archives selection: Retention of dossiers of participating professors born in the years 01 and 06 of each decade and selection of dossiers of participating professors especially distinguished in their fields.

³ Retention: 1 year after departure of participating professors.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

**08 - RESEARCH AND DEVELOPMENT /
RESEARCH AND DEVELOPMENT ORGANIZATION AND MANAGEMENT**

08.01

Research and development administration - Electronic records

Data used in creating and updating inventories of the institution's research projects: SIRU [Quebec Ministry of Education's Système d'information sur la recherche universitaire] files, etc.

copy	unit	Active	semi-active	inactive
primary [c]	unit responsible	2 years		D ¹

Notes : (**D** = Destruction **R** = Retention)

¹ Destruction: Research value ensured by retention of the following records on paper: research inventories, studies documenting the organization and development of research and development (schedule [08.02](#)).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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**08 - RESEARCH AND DEVELOPMENT /
RESEARCH AND DEVELOPMENT ORGANIZATION AND MANAGEMENT**

08.02

Research and development administration

Records dealing with the organization and management of the institution's research and development activities: research inventories, research development and funding studies, etc.

copy	unit	Active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years or until replacement of records by a new version.

² Archives selection: Retention of research inventories and studies substantively documenting the organization and development of the institution's research and development activities. Destruction of working records.

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**08 - RESEARCH AND DEVELOPMENT /
RESEARCH AND DEVELOPMENT ORGANIZATION AND MANAGEMENT**

08.03

Ethical codes and reviews

Records dealing with codes of ethics and ethical standards to be respected in the execution of research projects, especially where research involves experimentation on human or animal subjects: comments and recommendations concerning ethical standards in specific research projects, consent forms to be filled out by participants, statements of ethical standards for funding organizations, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years after completion of research project or, in the case of general policies or standards, until replacement of records by a new version.

² Archives selection: Retention of codes of ethics and general ethics policies pertaining to the institution's research community as a whole. Destruction of project files and support records.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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08 - RESEARCH AND DEVELOPMENT / RESEARCH AND DEVELOPMENT FUNDING

08.04

Research and development funding - Electronic records

Data used in the general management of research funds: data pertaining to grant applications, grants awarded, research fields, funding organizations, etc.

copy	unit	active	semi-active	inactive
primary [c]	unit responsible	X ¹	5 years	D ²

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years after end of grant.

² Destruction: Research value ensured by retention of reports summarizing grants awarded to the institution (see schedule [08.07](#)).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

08 - RESEARCH AND DEVELOPMENT / RESEARCH AND DEVELOPMENT FUNDING

08.05

In-house research and development funding programs

Records dealing with internal research monies, grant sources and sponsorships to which researchers can apply for funding.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	R
secondary [a]	other units concerned	2 years		D

Notes : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of records documenting the nature, resources and use of in-house research and development funding programs.

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

08 - RESEARCH AND DEVELOPMENT / RESEARCH AND DEVELOPMENT FUNDING

08.06

External research and development funding programs

Records dealing with external funding programs, grant sources and sponsorships to which researchers can apply for funding.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	5 years	D
secondary [a]	other units concerned	2 years		D

N o t e s : (**D** = Destruction **R** = Retention)

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

08 - RESEARCH AND DEVELOPMENT / RESEARCH AND DEVELOPMENT FUNDING

08.07

Research grant applications: Projects approved

Records dealing with grant applications (subject, objectives, schedules, etc.), use of funds allocated and results of the research projects funded: projects submitted, research contracts and sponsorships, correspondence, administrative forms pertaining to applications for and use of grants, evaluations, follow-ups, financial reports, etc. Records dealing with financial management of grants (budget accounts, grant cheques, etc.) are covered under a separate retention schedule (see schedule [03.13](#)).

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after completion of research project.

² Archives selection: Retention of records produced as part of grant application process, financial reports and final activities. Destruction of support records.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
Quebec Academic Institutions

08 - RESEARCH AND DEVELOPMENT / RESEARCH AND DEVELOPMENT FUNDING

08.08

Research grant applications: Rejected projects

Records dealing with unsuccessful applications for funding (including research contracts and sponsorships): grant applications, correspondence, etc.

copy	unit	active	Semi-active	inactive
primary [a]	unit responsible	3 years		R ¹
secondary [a]	other units concerned	2 years		D

N o t e s : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of lists of unsuccessful grant applications, if available. Destruction of files dealing with rejected applications.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

08 - RESEARCH AND DEVELOPMENT / RESEARCH AND DEVELOPMENT FUNDING

08.09

Organizations concerned with research and development

Records dealing with funding and non-funding organizations (government or private organizations): documentation, lists of applications, correspondence, forms, guidelines, etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	D
secondary [a]	other units concerned	2 years		D

N o t e s : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years or until replacement of records by a new version (forms, guidelines, etc).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

08 - RESEARCH AND DEVELOPMENT / IN-HOUSE RESEARCH

08.10

Research centres, laboratories and groups

Records dealing with the accreditation process, set-up and activities of the institution's research centres, laboratories, groups or institutes: accreditation criteria, records connected with the mission, composition, structure, organization, internal management and development of a research unit, correspondence, studies, reports , etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R
secondary [a]	other units concerned	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years after the creation of the research centre, laboratory or group, or as long as the records are used in the organization and management of the unit and the pursuit of its objectives.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

08 - RESEARCH AND DEVELOPMENT / IN-HOUSE RESEARCH

08.11

Chairs

Records dealing with the accreditation, setting up and achievements of the institution's chairs: accreditation criteria, letters patent, records connected with the mission, composition, structure, organization, internal management and development of chairs, correspondence, studies, reports, etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after the creation of a chair or as long as the records are used in the process of establishing a chair and the pursuit of its objectives.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

08 - RESEARCH AND DEVELOPMENT / IN-HOUSE RESEARCH

08.12

Research and development projects - Electronic records

Data on the nature of research projects, provisions of research contracts and sponsorships, financial resources allocated, project directors, activity schedules, etc.

copy	unit	Active	semi-active	inactive
primary [c]	unit responsible	3 years		R

N o t e s : (**D** = Destruction **R** = Retention)

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

08 - RESEARCH AND DEVELOPMENT / IN-HOUSE RESEARCH

08.13

Research and development projects

All records dealing with the management of the institution's various research projects: documents exchanged with funding organizations, documentation on grant programs, research projects, minutes of research committee meetings, schedules, etc.

copy	unit	Active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after conclusion of research project.

² Archives selection: Retention of research contracts and protocols as well as final reports. Destruction of support records (correspondence, financial records, forms, etc.).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
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08 - RESEARCH AND DEVELOPMENT / IN-HOUSE RESEARCH

08.14

Research files

Working records used in research projects carried out under the authority of a research unit recognized by the institution: documentation, research proposals, notes, calculations, files of individual participants in research projects involving human beings, analytical reports, statistical findings, surveys and questionnaires, investigative reports, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	X ²	D ³
secondary [a]	other units concerned	X ¹		D

Notes :

(**D** = Destruction **R** = Retention)

¹ Retention: 2 years after conclusion of research project.

² Retention: 5 years (or as long as prescribed by the contractual requirements of the funding organizations and partners) for records that can be used to validate the methodology, authenticate the process and demonstrate respect for the research protocol and could be used in subsequent research projects. Relevance of retention should be reviewed every 5 years.

³ Destruction: Research value ensured by retention of research project final reports (see schedule 08.13).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
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08 – RESEARCH AND DEVELOPMENT / IN-HOUSE RESEARCH

08.15

Use of laboratory animals and biological material - Electronic records

Data used in the management of the institution's research protocols: orders for laboratory animals, equipment and biological material, supplier relations, research clients and associates, inventories, etc.

copy	unit	active	semi-active	inactive
primary [c]	unit responsible	2 years		D ¹

Notes : (**D** = Destruction **R** = Retention)

¹ Destruction: Research value ensured by retention of paper records documenting protocols for use of laboratory animals (schedule [08.16](#)).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

08 – RESEARCH AND DEVELOPMENT / IN-HOUSE RESEARCH

08.16

Use of laboratory animals and biological material

Records dealing with the management of protocols for use of laboratory animals, equipment and biological material by the institution's researchers: user files, authorization requests, price registers, procedures for and files on animal maintenance, care and treatment, drug and barbiturate use registers, etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	2 years		D

N o t e s : (D = Destruction R = Retention)

¹ Retention: 2 years. Records concerned with specific laboratory animals are retained for 2 years after the death of the animal or its departure from the institution's laboratories.

² Archives selection: Retention of laboratory animal use protocols. Destruction of other records.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
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08 - RESEARCH AND DEVELOPMENT / RESEARCHERS

08.17

Researchers - Electronic records

Data used in ensuring the registration and updating of directories of the institution's researchers: civil data, status, etc.

copy	unit	Active	semi-active	inactive
primary [c]	unit responsible	2 years	X ¹	D ²

Notes : (D = Destruction R = Retention)

¹ Retention: 10 years after the conclusion of the last research project carried out.

² Destruction: Research value ensured by retention of the following paper records: research inventories (see schedule 08.02), research contracts and reports (see schedule 08.13), researchers' files (see schedule 08.18).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

08 - RESEARCH AND DEVELOPMENT / RESEARCHERS

08.18

Researchers

Records relating to research profiles and achievements of professor-researchers: grant applications, reports, correspondence and all other records providing in particular, the names of funding organizations, departments, project titles, grant amounts awarded, number of grants, etc.

copy	unit	Active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ³		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years after departure of researcher.

² Archives selection: Retention of files of researchers born in the years 01 and 06 of each decade and files of researchers particularly noted in their field of research.

³ Retention: 1 year after departure of researcher.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
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08 - RESEARCH AND DEVELOPMENT / COOPERATION - RESEARCH AND DEVELOPMENT

08.19

Cooperation and partnership - Research and development

Records dealing with research cooperation and partnership activities and strategic alliances involving the institution and different public or private organizations, national and international (teaching and research organizations, private organizations and corporations, etc): correspondence, agreements, memoranda, protocols and other documents, etc.

copy	Unit	Active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ¹		D

Notes :

(D = Destruction R = Retention)

¹ Retention: 2 years after the end of the cooperation agreement.

² Archives selection: Retention of significant records documenting the nature, objectives and results of research cooperation agreements involving the institution.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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08 - RESEARCH AND DEVELOPMENT / COOPERATION - RESEARCH AND DEVELOPMENT

08.20

Cooperating and partnership organizations – Research and development

Records documenting exchanges and relations maintained with various cooperating organizations with an interest in the institution's research: correspondence, cooperative programs, framework agreements, etc.

copy	unit	Active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ¹		D

N o t e s : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years or until expiry of cooperation master agreement.

² Archives selection: Retention of framework agreements and significant correspondence documenting the nature of the relations maintained by the institution with the various cooperating organizations.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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08 - RESEARCH AND DEVELOPMENT / COOPERATION - RESEARCH AND DEVELOPMENT

08.21

Participating professors – Research and development

Records documenting the research profiles and achievements of professor-researchers: formal record of participation in cooperative projects, reports, correspondence and any other records containing the names of cooperating organizations, departments, project titles, etc, etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ³		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after departure of the participating professor.

² Archives selection: Retention of dossiers of participating professors born in the years 01 and 06 of each decade and selection of dossiers of participating professors especially distinguished in their fields.

³ Retention: 1 year after departure of participating professors.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

09 - INFORMATION AND COMMUNICATIONS / COMMUNICATIONS

09.01

Institutional identification

Records dealing with the definition, design and modification of all forms of the official corporate identification that represents the institution and its various components: logos and depictions of the institution's name (signs, official stationery, vehicles, facilities, signage), coats of arms, mottos, seals, colours, flags, songs, emblems, etc.

copy	Unit	active	semi-active	inactive
primary [e]	unit responsible	X ¹		R ²
secondary [e]	other units concerned	X ¹		D

Notes :

(**D** = Destruction **R** = Retention)

¹ Retention: 2 years or until replacement of records by a new version.

² Archives selection: Retention of reference records showing institution identifications and records documenting the definition and management of the application of the official identification standards for the institution and its various components.

[] = medium ---> a = paper b = microfilm c = computer d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

09 – INFORMATION AND COMMUNICATIONS / COMMUNICATIONS

09.02

Official ceremonies and special events

Records dealing with ceremonies, celebrations, inaugurations, visits, special days, anniversaries, receptions, events, parties, launches, openings and other special events organized by the institution and its various components: invitation and attendance lists, invitation cards, publicity, posters, folders, documentation, press clippings, photographs, texts of speeches, other notes (protocols, proceedings, security, banquets), etc.

copy	unit	Active	semi-active	Inactive
primary [e]	unit responsible	X ¹	3 years	R ²
secondary [e]	other units concerned	X ¹		D

N o t e s :

(D = Destruction R = Retention)

¹ Retention: 2 years after holding the event.

² Archives selection: Retention of press releases, programs of activities, visitor registers, lists of invitees and attendees, photographs, speeches, significant written materials, specimen invitations and promotional documents (folders, posters, etc.) associated with major events organized by the institution or one of its components. Destruction of support records used in organizing events (reservation forms, publicity requisitions, security measures, etc.).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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Records Retention Schedules for
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09 - INFORMATION AND COMMUNICATIONS / COMMUNICATIONS

09.03

Distinguished guest books

Guest books documenting the proceedings of official ceremonies or special events and containing the signatures of distinguished visitors received or honoured by the institution or one of its components.

Copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹		R

Notes : (D = Destruction R = Retention)

¹ Retention: Until the register is full.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

09 - INFORMATION AND COMMUNICATIONS / COMMUNICATIONS

09.04

Conferences, addresses, speeches

Records dealing with talks, speeches, conferences, presentations and other statements (communications) made by members of the institution or by outside public figures invited to speak in the course of activities organized by the institution.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	2 years	3 years	R ¹
secondary [a]	other units concerned	1 year		D

N o t e s :

(**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of texts of speeches given in the course of the institution's activities or outside the institution by its members as part of their duties (representing the institution). Retention of speeches given by outside public figures dealing with subjects related to the activities of the institution or one of its components. Destruction of texts of speeches not dealing with the institution's activities.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
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09 - INFORMATION AND COMMUNICATIONS / INFORMATION

09.05

Internal information

Records dealing with the execution, development and follow-up of internal information programs, the design, drafting, publication and dissemination of information and communication documents intended for all employees of the institution or one of its components: newspapers, newsletters and bulletins, announcements and releases, texts of speeches and addresses, etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	2years	3 years	R ¹
secondary [a]	other units concerned	1 years		D

N o t e s : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of internal information policies and official records disseminated by the institution or one of its components. Destruction of working records.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
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09 – INFORMATION AND COMMUNICATIONS / INFORMATION

09.06

Publicity and marketing

Records dealing with communication strategies, publicity campaigns, sponsorships and marketing activities to promote the institution's activities and products: folders and brochures, posters, advertising inserts, publicity disseminated in the print media (newspapers, magazines), the electronic media (radio, television, Internet) or posted in public places (notices, posters, displays, etc.).

copy	Unit	active	semi-active	inactive
primary [e]	unit responsible	X ¹	3 years	R ²
secondary [e]	other units concerned	X ¹		D

N o t e s : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years or until replacement of records by a new version.

² Archives selection: Retention of communication strategies, promotional documents (brochures, posters, sound and video recordings, the contents of promotional ads disseminated over the Internet, etc.), programs, records and reports of promotional activities and publicity campaigns (statistics, outcomes evaluations, impact analyses). Destruction of support and working records.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
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09 – INFORMATION AND COMMUNICATIONS / INFORMATION

09.07

Media relations

Records produced by various written and electronic media on the institution's activities (press clippings, reviews). This schedule also covers records generated by the institution to inform the media of major events and important activities or any other information intended for the general public (press releases, press conferences).

copy	unit	active	Semi-active	inactive
primary [e]	unit responsible	2 years		R ¹
secondary [e]	other units concerned	1 year		D

N o t e s : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of press releases, press clippings and reviews dealing directly or indirectly with the institution, specimens of press conference invitations and complete media information kits (press releases, information and promotional documents, photographs, etc.).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
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09 – INFORMATION AND COMMUNICATIONS / INFORMATION

09.08

Publications - Electronic records

Data used in the layout, editing and printing of the various publications of the institution or one of its components: books, reviews, magazines, journals, etc.

copy	unit	active	Semi-active	inactive
primary [c]	unit responsible	X ¹	X ²	D ³
secondary [c]	other units concerned	X ⁴		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 1 year after publication of documents.

² Retention: Until the next updating of records (re-evaluation after 5 years).

³ Destruction: Research value ensured by retention of paper publications (schedules [09.09](#) and [09.10](#)).

⁴ Retention: Until publication has been finalized.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

09 - INFORMATION AND COMMUNICATIONS / INFORMATION

09.09

Administrative publications

Records dealing with the preparation, production and distribution of the administrative publications of the institution or one of its components (books, reviews and periodicals, notices, reports, brochures, bulletins, newsletters, academic calendars, etc.): manuscripts and working texts, files of publishing projects accepted or rejected (correspondence, forms, grant applications, submissions, publicity, etc.), financial records associated with the production and promotion of publications, published texts. Learned or scientific publications are covered by a separate retention schedule (see schedule [09.10](#)).

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ¹		D

N o t e s :

(**D** = Destruction **R** = Retention)

¹ Retention: 2 years after publication of document or text.

² Archives selection: Retention of one copy of all publications of an administrative nature issued by the institution or one of its components, lists of publications and of rejected publishing proposals. Destruction of working and support records from the production and distribution of administrative publications.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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09 - INFORMATION AND COMMUNICATIONS / INFORMATION

09.10

Learned or scientific publications

Records dealing with the preparation, production and dissemination of learned or scientific publications involving the institution, one of its components or one of its members (books, journals, etc.): manuscripts and working texts, files of publishing projects accepted or rejected (correspondence, forms, grant applications, submissions, publicity, etc.), financial records associated with the production and promotion of texts, published material. Publications of an administrative nature are covered by a separate retention schedule (see schedule [09.09](#)).

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	5 years	R ²
secondary [a]	other units concerned	X ¹		D

N o t e s :

(D = Destruction R = Retention)

¹ Retention: 2 years after publication of document or text.

² Archives selection: Retention of one copy of all printed and published material involving the institution or one of its components (depending on the internal policies of each institution) and lists of learned or scientific publications. Destruction of working and support records generated in the production and dissemination of learned or scientific publications.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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09 – INFORMATION AND COMMUNICATIONS / INFORMATION

09.11

Mail, express, transport

Records dealing with the management of the institution's internal and external mail delivery systems as well as the transport and delivery of goods and packages: delivery orders, franking rights, postage meter reports, letter and parcel despatch by outside companies, customs declarations and despatch notices (Canada Post), registration receipts, bills of lading, notices to carriers concerning customs parcel inspections, delivery logs (express), etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	3 years		D
secondary [a]	other units concerned	1 year		D

N o t e s :

(**D** = Destruction **R** = Retention)

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
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09 – INFORMATION AND COMMUNICATIONS / INFORMATION

09.12

Reprography

Records dealing with the management of the institution's reprographic services: photocopy requisitions, internal printing requisitions, internal and external invoicing and billing, management of use and money collection from coin-operated photocopiers, servicing reports, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	4 years	D
secondary [a]	other units concerned	1 year		D

N o t e s : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years (non-financial records such as requisitions for photocopying and printing work should be destroyed after 2 years).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

09 - INFORMATION AND COMMUNICATIONS / TELECOMMUNICATIONS

09.13

Telecommunications – Electronic records

Data used in the management of the institution's telecommunications systems: records concerning the installation and set-up of telecommunications infrastructure, telecommunications equipment and installations inventories, lists of accounts, invoicing and billing, user lists for telephone, e-mail, voice mail and fax systems and services, etc.

copy	unit	active	Semi-active	inactive
primary [c]	unit responsible	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: As long as the equipment is in service and client account is active.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

09 - INFORMATION AND COMMUNICATIONS / TELECOMMUNICATIONS

09.14

Telecommunications

Records dealing with the management of the institution's telecommunications systems: needs analyses, acquisitions, infrastructure installations, use and management of equipment and telephone lines, lists of accounts, invoicing and billing, long-distance controls, user lists for telephone, e-mail, voice mail and fax systems and services, etc.

copy	unit	active	Semi-active	inactive
primary [a]	unit responsible	2 years	5 years	D
secondary [a]	other units concerned	2 years		D

N o t e s : (**D** = Destruction **R** = Retention)

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

09 - INFORMATION AND COMMUNICATIONS / TELECOMMUNICATIONS

09.15

E-mail – Electronic records

E-mail messages sent or received by members of the institution: liaison records, notices of meetings, various memos and correspondence. This schedule does not cover electronic files attached to e-mail messages, which are covered by separate retention schedules according to the nature of the records concerned.

copy	Unit	active	semi-active	inactive
primary [c]	unit responsible	X ¹		D ²
secondary [c]	other units concerned	X ¹		D

N o t e s :

(**D** = Destruction **R** = Retention)

¹ Hard copies of e-mails documenting and substantiating major transactions, decisions or exchanges of information (opinions, comments, positions) or which could be associated with other paper records should be printed immediately upon creation or receipt, and placed in the appropriate file. Other e-mails should be destroyed immediately after sending or use.

² Destruction: Research value ensured by retention of paper records.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
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09 - INFORMATION AND COMMUNICATIONS / TELECOMMUNICATIONS

09.16

Voice Mail

Telephone messages recorded and received in the institution's users' voice mailboxes.

copy	Unit	active	semi-active	inactive
primary [c]	unit responsible	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Messages are erased automatically after a period fixed by the institution.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

**09 – INFORMATION AND COMMUNICATIONS /
ARCHIVES, LIBRARY, AND MUSEUM HOLDINGS**

09.17

Archives, library, and museum holdings - Electronic records

Data used in the management of the institution's archives, library, and museum holdings (books, periodicals and journals, brochures, rare books, archival fonds, audio-visual records, works of art, scientific collections, etc.): acquisitions, registrations, evaluations, storage, processing and treatment, descriptions, retrievals, loans, exhibitions, reservations, consultations and preservation.

copy	Unit	active	semi-active	inactive
primary [c]	unit responsible	X ¹		D ²

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: As long as holdings are retained by the institution (reference files), as long as users have borrowing rights (client files) or until the documents or museum pieces are returned (loan files).

² Destruction: Research value ensured by retention of the following paper records: evaluation, reference and acquisition files (schedule [09.18](#)), processing and treatment files of archival fonds and museum pieces (schedule [09.19](#)), catalogues, inventories and research aids (schedule [09.20](#)).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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**RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS**

**09 – INFORMATION AND COMMUNICATIONS /
ARCHIVES, LIBRARY, AND MUSEUM HOLDINGS**

09.18

Acquisition of archives, library, and museum holdings

Records dealing with the acquisition process of the institution's archives, library, and museum holdings (books, journals and periodicals, brochures, rare books, archival fonds, audio-visual records, works of art, scientific collections, etc.): acquisition, evaluation and reference files, purchase requisitions, purchase orders, invoices, correspondence with suppliers, subscription renewals, etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	X ²	R ³
secondary [a]	other units concerned	1 year		D

N o t e s :

(**D** = Destruction **R** = Retention)

¹ Retention: 2 years after acquisition or end of subscription (books, periodicals and journals, databanks) or as long as holdings are retained by the institution (archival fonds, rare books, museum collections, etc.).

² Retention: 5 years for support records.

³ Archives selection: Retention of evaluation, acquisition and reference files associated with the institution's archival fonds, rare books and museum collections. Destruction of support records.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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**RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS**

09 - INFORMATION AND COMMUNICATIONS / ARCHIVES, LIBRARY, AND MUSEUM HOLDINGS

09.19

Treatment of archives, library, and museum holdings

Records dealing with the management of the processing and treatment of the institution's archives, library, and museum holdings (books, journals and periodicals, brochures, rare books, archival fonds, audio-visual records, works of art, scientific collections, etc.): treatment standards and procedures, treatment files (description, physical preparation, bookbinding, restoration), lists (documents or pieces to be or being treated), cataloguing worksheets, treatment statistics, etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	2 years		R ¹

N o t e s :

(**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of files documenting the treatment of the institution's archival fonds, rare books and museum holdings.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
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09 - INFORMATION AND COMMUNICATIONS / ARCHIVES, LIBRARY, AND MUSEUM HOLDINGS

09.20

Dissemination and use of archives, library, and museum holdings

Records dealing with the management of the dissemination and use of the institution's archives, library, and museum holdings (books, journals and periodicals, brochures, rare books, archival fonds, audio-visual records, works of art, scientific collections, etc.): consultation requests, loans, client files, exhibitions, control of documents and objects returned late or not returned, holds, inter-library loans, catalogues, inventories, search tools, statistics on consultation or use, management of material reserved by the teaching staff, etc. Files dealing with the organization of exhibitions are covered by a separate retention schedule (see schedule [06.15](#)).

copy	unit	active	semi-active	Inactive
primary [a]	unit responsible	X ¹		R ²
secondary [a]	other units concerned	X ¹		D

N o t e s :

(**D** = Destruction **R** = Retention)

¹ Retention: 3 years or until replacement of records by a new version.

² Archives selection: Retention of catalogues, inventories and search tools published or printed for the purpose of distribution. Retention of loan contracts for archival or museum pieces for exhibition purposes as well as cumulative use statistics. Destruction of support records.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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**09 - INFORMATION AND COMMUNICATIONS /
ARCHIVES, LIBRARY, AND MUSEUM HOLDINGS**

09.21

Archives, library, and museum holdings – Users

Records dealing with the user fees applied and services rendered to the users of the institution's archives, library, and museum holdings: requests for documentary databank access codes, special privileges, allocation and booking of work or consultation rooms, document reproduction services, needs assessments, etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	2 years		R ¹
secondary [a]	other units concerned	1 year		D

N o t e s : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of reports and statistics documenting visit or user activities of the archives, library, and museum holdings.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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**RECORDS RETENTION SCHEDULES FOR
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09 - INFORMATION AND COMMUNICATIONS / AUDIO-VISUAL AND COMPUTER

09.22

Audio-visual and photographic equipment – Electronic records

Data used in the management of the institution's audio-visual and photographic materials and equipment: inventories, purchases, recordings, distribution, loans, reservations, maintenance, repairs, etc.

copy	unit	active	semi-active	Inactive
primary [c]	unit responsible	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 2 years (loans, reservations and distribution) or as long as the equipment is kept by the institution (purchases, maintenance and repairs).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
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09 - INFORMATION AND COMMUNICATIONS / AUDIO-VISUAL AND COMPUTER

09.23

Audio-visual and photographic equipment

Records dealing with the management of the institution's audio-visual and photographic materials and equipment: inventories, purchase requisitions, registration forms, distribution lists, loan, reservation and maintenance forms, technical problems, repairs, equipment disappearance reports, etc.

copy	unit	Active	semi-active	inactive
primary [a]	unit responsible	X ¹		D

N o t e s : (**D** = Destruction **R** = Retention)

¹ Retention: 3 years (distribution, installations, loans and reservations) or as long as the equipment is in the institution's possession (purchases, maintenance and repairs).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
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09 - INFORMATION AND COMMUNICATIONS / AUDIO-VISUAL AND COMPUTER

09.24

Audio-visual and photographic productions – Electronic records

Data used in inventory control of the institution's audio-visual and photographic productions, as well as regular production requests.

copy	unit	active	semi-active	Inactive
primary [c]	unit responsible	X ¹		D ²

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years after completion of project (control of production requests) or as long as the system exists (production inventories).

² Destruction: Research value ensured by retention of search tools describing the institution's audio-visual and photographic archives (schedule [09.20](#)).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

09 - INFORMATION AND COMMUNICATIONS / AUDIO-VISUAL AND COMPUTER

09.25

Audio-visual and photographic productions

Records dealing with the design and production of audio-visual materials (sound recordings, videotapes, films etc.) and photographic materials (proofs, negatives, slides, etc.), with the management of outside productions in this field as well as with various technical services available to institution members and outside clients: technical files, budgets, audio-visual and photographic productions produced by the institution concerning its activities.

copy	unit	Active	semi-active	inactive
primary [d]	unit responsible	2 years	3 years	R ¹
secondary [d]	other units concerned	2 years		D

N o t e s : (**D** = Destruction **R** = Retention)

¹ Archives selection: Selection of records according to the importance of the subjects dealt with (in relation to the activities and achievements of the institution or one of its components), the nature of the records as well as the technical quality of the productions. Retention of records supplying significant information on the nature, contents (date, event, persons photographed or involved, etc.) and production process (contract, copyright permission, scenario, etc.).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

09 - INFORMATION AND COMMUNICATIONS / AUDIO-VISUAL AND COMPUTER

09.26

Audio-visual and photographic resources - Users

Records dealing with privileges granted and services provided to the users of the institution's audio-visual and photographic resources: special privileges, specific services, needs evaluations, etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	2 years		R ¹
secondary [a]	other units concerned	1 year		D

Notes : (**D** = Destruction **R** = Retention)

¹ Archives selection: Retention of reports and statistics documenting audio-visual and photographic resources visit and user activities.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

09 - INFORMATION AND COMMUNICATIONS / AUDIO-VISUAL AND COMPUTER

09.27

Computer equipment – Electronic records

Data used in the management of the institution's computer materials and equipment: inventories, purchases, registrations, distribution, loans, reservations, maintenance, repairs, etc.

copy	Unit	active	semi-active	inactive
primary [c]	unit responsible	X ¹		D

Notes : (D = Destruction R = Retention)

¹ Retention: 2 years (loans, reservations and distribution) or as long as the equipment is owned by the institution (purchases, maintenance and repairs).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
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09 - INFORMATION AND COMMUNICATIONS / AUDIO-VISUAL AND COMPUTER

09.28

Computer equipment

Records dealing with the management of the institution's computer materials and equipment: inventories, purchase requisitions, registration forms, distribution lists, loan, reservation and maintenance forms, technical problems, repairs, equipment disappearance reports, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹		D

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 3 years (distribution, installations, loans and reservations) or as long as the equipment is kept by the institution (purchases, maintenance, repairs).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

09 - INFORMATION AND COMMUNICATIONS / AUDIO-VISUAL AND COMPUTER

09.29

Software – Electronic records

Data used in the operation and management of the institution's computer systems: data dictionaries, programs created by the institution, programs purchased, software, package and program inventories, etc.

copy	unit	active	semi-active	inactive
primary [c]	unit responsible	X ¹	X ²	D ³

Notes : (**D** = Destruction **R** = Retention)

¹ Retention: 3 years or as long as the software or computer program is in use.

² Retention: As long as the data can be used, should remain accessible or are to be transferred to a new computer program.

³ Destruction: Research value ensured by retention of records dealing with institutional software, packages or programs developed by the institution (schedule [09.30](#)).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

09 - INFORMATION AND COMMUNICATIONS / AUDIO-VISUAL AND COMPUTER

09.30

Software

Records dealing with the computer software, packages and programs used in the operation and management of the institution's computer systems: purchase, loan and rental files, data dictionaries, programs created by the institution, programs purchased, systems documentation, computer software, package and program inventories, etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹	X ²	D ³

Notes :

(D = Destruction R = Retention)

¹ Retention: As long as the software package or program is in use. Records dealing with computer software, package or program loans should be destroyed 1 year after closing the file.

² Retention: As long as the data can be used, should remain accessible or are to be transferred to a new computer program.

³ Archives selection: Retention of records dealing with institutional software packages or programs developed by the institution.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

09 - INFORMATION AND COMMUNICATIONS / AUDIO-VISUAL AND COMPUTER

09.31

Computers systems – Electronic records

Data used in the management and operation of the institution's computer systems: inventories and descriptions of computer systems, computer project requests, authorizations to use computer resources, valid code files, computer file inventories, tape and cassette inventories, user access codes, etc.

copy	unit	active	Semi-active	inactive
primary [c]	unit responsible	X ¹		D ²

Notes : (D = Destruction R = Retention)

¹ Retention: As long as system exists or client account is active.

² Destruction: Research value ensured by retention of the following paper records: computer systems development files (project descriptions, documentation, applicants, costs) and use statistics (schedule [09.32](#)), annual reports of units responsible for the institution's various computer systems (schedule [01.27](#)).

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

09 - INFORMATION AND COMMUNICATIONS / AUDIO-VISUAL AND COMPUTER

09.32

Computer systems

Records dealing with the management and operation of the institution's computer systems: computer systems inventories and descriptions, computer project requests, systems development and maintenance files, computer resources user authorizations, valid code files, computer file inventories, tape and cassette inventories, user access codes, etc.

copy	Unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹		R ²

Notes :

(D = Destruction R = Retention)

¹ Retention: 3 years or as long as system exists or client account is active. Support records should be destroyed 2 years after closing of file (in-house development requests that are not approved, systems use forms, production requests, etc.).

² Archives selection: Retention of computer systems development files (project descriptions, documentation, applicants, costs) and use statistics.

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

09 - INFORMATION AND COMMUNICATIONS / AUDIO-VISUAL AND COMPUTER

09.33 Web sites – Electronic records

Data supplied by the institution or one of its components and accessible over the Internet, to authorized clients (internal or external) or to anyone with Internet access, as applicable, providing information on the institution's operations, structures, resources, services, etc. This information also enables users to obtain information or services, perform certain transactions and communicate directly with the institution's various units and resource persons by e-mail.

copy	unit	Active	semi-active	inactive
primary [c]	unit responsible	X ¹		R ²

Notes : (D = Destruction R = Retention)

¹ Retention of information until withdrawal or replacement by a new version.

² Retention of an annual profile of the Web site. Important records included as different Web site pages should be covered under separate retention schedules (each unit responsible for a Web site is responsible for the application of this schedule and for all schedules intended to ensure the preservation of information or records collected, transmitted or exchanged through its Web site..

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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09 – INFORMATION AND COMMUNICATIONS / AUDIO-VISUAL AND COMPUTER

09.34

Web sites

Records dealing with the creation, updating and development of the Web sites of the institution or one of its components: site creation files (presentation pages, menus, information texts, pictures, audio-visual elements embedded in the Web site, lists of hyperlinks), updating and development records, comments received, lists of the institution's Web sites, etc.

copy	unit	active	semi-active	inactive
primary [a]	unit responsible	X ¹		R ²

Notes : (D = Destruction R = Retention)

¹ Retention: As long as the Web site exists. Support records (especially former versions of different information sections) should be destroyed after 3 years.

² Archives selection: Retention of lists of the institution's Web sites. Retention of records representative of the creation and development of the Web site's structure and major elements. Important records included in the site's various pages should be covered under separate retention schedules (each unit responsible for a Web site is responsible for applying this schedule and all retention schedules intended to ensure the preservation of information or records collected, transmitted or exchanged through its Web site).

[] = medium ---> a = paper b = microfilm c = computer d = audio-visual e = other

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RECORDS RETENTION SCHEDULES FOR
QUEBEC ACADEMIC INSTITUTIONS

09 - INFORMATION AND COMMUNICATIONS / AUDIO-VISUAL AND COMPUTER

09.35

Computer resources – Users

Records dealing with user rights granted and services provided to users of the institution's computer resources: requests for computer systems access codes, special privileges, requests for specific computer applications, needs assessments, etc.

copy	Unit	Active	semi-active	inactive
primary [a]	unit responsible	3 years		D
secondary [a]	other units concerned	1 year		D

Notes : (**D** = Destruction **R** = Retention)

[] = medium ---> a = paper b = microfilm c = electronic d = audio-visual e = other

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