

The Corporation of the Town of The Blue Mountains

By-Law Number 2024-82

Being a By-law to Provide a Schedule of Retention Periods for the Records of The Corporation of The Town of The Blue Mountains

WHEREAS 255(1) of the *Municipal Act 2001, 5.0. 2001, Chapter 25* provides that except as otherwise provided, a record of a municipality or local board may only be destroyed in accordance with this section;

AND WHEREAS subsection 255(2) of the *Municipal Act 2001, 5.0. 2001, Chapter 25* provides that a record of a municipality may be destroyed if a retention period for the record has been established under this section;

AND WHEREAS subsection 255 (3) of the *Municipal Act 2001, 5.0. 2001, Chapter 25* provides that a municipality may establish retention periods during which the records of the municipality and local boards of the municipality must be retained and preserved;

AND WHEREAS Council of the Town of The Blue Mountains has received staff report FAF.24.112 "Update to Record Retention By-law 2023-80" and deems it expedient to repeal and replace the current Records Retention By-law 2023-80 for the retention of the records of The Corporation of the Town of The Blue Mountains;

NOW THEREFORE, Council of The Corporation of the Town of The Blue Mountains hereby enacts as follows:

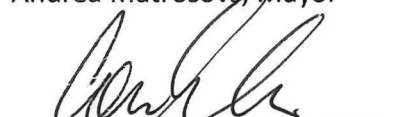
1. **THAT** the retention periods set out in Schedule "A" attached hereto shall be administered, in coordination with the provisions of the "Records and Information Management Policy, POL.COR.22.01"
2. **THAT** By-law 2023-80 being a by-law to establish schedules of retention periods for records of The Corporation of the Town of The Blue Mountains be repealed.

And Further that this By-law shall come into force and take effect upon the enactment thereof.

Enacted and passed this 16th day of December, 2024



Andrea Matrosovs, Mayor



Corrina Giles, Town Clerk

Class Code	Secondary Heading	Scope Notes*	Security Classification	Responsible Dept.	Record Format	Total Retention Noted in Years LEGEND: P= PERMANENT, S= SUPERSEDED, E=EVENT
REF	Reference Library	Includes non-record files and documents that need to be kept for reference purposes, organized by subject folders. Publications that are not created or produced by the Town but are used only as reference. Includes: Policies and Procedures-Provincial & Federal, Municipal Legislation, Federal Legislation, Community Protection Programs, all reports and memos to Council.	Confidential	Originating	Electronic and Physical	5
TRANS	Transitory Records	Any records created for a limited time to complete a routine action, to be used in preparation of final records or to be retained as convenience copies by members of staff who do not have primary responsibility for them. They are not required to be kept by the Town record keeping obligational or legal requirements. Includes: Council Minutes (Working Papers, Audio Tapes(not Inaugural)), Council Committee Minutes (Working Papers, Audio Tapes) and Motions and Resolutions (Other Municipalities).	Confidential	Originating	Electronic and Physical	2
DIG	Digital Transient Records	Includes all call logs or messages, including instant messages, and call logs sent via Zoom, Teams or other webinar/virtual meeting platforms, and call logs, texts and SMS Messages from, to and between Town owned phones.	Confidential	Originating	Electronic	30 days
A01	Associations and Organizations	Includes correspondence, minutes, agenda, notices and reports regarding organizations and associations to which staff members belong or with which they communicate in the course of their duties such as Drayton & Community Citizens Association, AMCTO, MISA, Ontario Farm Drainage Association, etc. Where possible, these records should be filed by their subject, not the originator or recipient of the report and/or correspondence. EXCLUDES: Intergovernmental Relations – see A16 Membership Fees - see Accounts Payable, F01	Confidential	Originating	Electronic and Physical	2
A02	Staff Committees and Meetings	Includes records regarding the activities of staff committees and meetings. Includes notices of meetings, agenda, minutes, etc. May also include copies of staff activity reports. EXCLUDES: Council Minutes and Agenda - see C03-C04 Standing Committees - see C05-C06 Health & Safety Committee Meetings – see H04	Confidential	Originating	Electronic and Physical	4
A03	Computer Systems and Architecture	Includes records relating to the design of computer systems, system changes and/or software and network architecture, including needs assessments, business cases, project charter, process flowchart documentation, impact analysis, user and system requirements, specifications, testing plans and results, user sign-offs, project management meeting minutes/documentation, system development documentation, software design records, and software inspection notes. Also includes records on system installations/conversions and product evaluations. May also include requests for significant modification, fixes and upgrades. EXCLUDES: Reports - file by subject Acquisitions - see F18	Confidential	Originating	Electronic and Physical	Superseded + 6

Class Code	Secondary Heading	Scope Notes*	Security Classification	Responsible Dept.	Record Format	Total Retention Noted in Years LEGEND: P= PERMANENT, S= SUPERSEDED, E=EVENT
A04	Conferences and Seminars	Includes invitations, approvals, agenda, notes on proceedings, and other records regarding conferences, conventions, seminars and special functions attended by staff, or sponsored by the municipality. Includes all travel and accommodation arrangements for conferences and seminars. EXCLUDES: Speeches and Presentations - see M08 Employee and Council Expenses - see F09 Ceremonies and Events - see M02 Invoices - see F01 Rental Agreements - see L14	Public	Originating	Electronic and Physical	2
A05	Consultants - Do Not Use this Code	Category removed. Records contained should be filed in other classification categories. For: Reports - file by subject Consulting relationship management and evaluation – see A15 Project based monitoring of consultant activities – see project file Procurement, Quotations and Tenders - see F18 Invoices - see F01				
A06	Inventory Control	Includes inventory statements and reports, and all other records regarding the control of supplies, furnishings and office and small equipment stock levels. EXCLUDES: Assets - see F06 Petroleum Products – see E24	Confidential	Originating	Electronic and Physical	6
A07	Office Equipment and Furniture	Includes records regarding the design and maintenance of owned and leased office equipment and furniture. Includes chairs, desks, tables, photocopiers, printers, scanners, etc. Records are retained until the item is disposed of, plus one year. EXCLUDES: Computer Hardware and Software - see A03 Service Agreements - see L14 Assets - see F06	Public	Originating	Electronic and Physical	E + 1
A08	Office Services	Includes records regarding rates and services provided by courier, mail and postage firms. Also includes records regarding the inter-office mail system, internal printing, and management of forms and templates.	Public	Originating	Electronic and Physical	E + 1
A09	Policies and Procedures	Contains records regarding the development of policy and procedure manuals, work instructions, protocols, Standard Operation Procedures, guidelines and directives. Also includes the actual manuals, supporting documentation, etc relating to administrative, governance and operational processes. EXCLUDES: Training and Development - see H12	Public	Originating	Electronic and Physical	E+15
A10	Records Management	Includes information regarding the management of corporate records, regardless of medium. Specific records include file listings, classification structures, feasibility studies, and records centre operations. E= Retain until superseded, plus 2 EXCLUDES: Retention By-Law - see C01 Policies and Procedures - see A09 Records Disposition - see A11	Public	Clerk's	Electronic and Physical	E + 2
A11	Records Disposition	Includes records regarding the disposition of municipal records. Includes the disposal method used and forms authorizing and describing the destruction of records.	Public	Clerk's	Electronic and Physical	P

Class Code	Secondary Heading	Scope Notes*	Security Classification	Responsible Dept.	Record Format	Total Retention Noted in Years LEGEND: P= PERMANENT, S= SUPERSEDED, E=EVENT
A12	Telecommunications Systems	Includes records regarding all types of telecommunications systems. Includes telephone systems, facsimile machines, base and mobile stations, towers, antennae, police and fire communications systems, and 911 emergency systems. E = Retain until superseded, plus 2 years EXCLUDES: Licenses - see P09 Assets - see F06 Long Distance Call Records – see F01 Agreements - see L04 or L14	Confidential	Originating	Electronic and Physical	E + 2
A13	Travel & Accommodation - DO NOT USE THIS CODE	Do Not Use - See A04				
A14	Uniforms and Clothing	Includes records regarding uniforms and special clothing used by municipal staff members, such as police uniforms, firefighters' clothing, coveralls and safety clothing. EXCLUDES: Payroll deductions for uniforms, boot allowance – see F16 Purchase Orders and Requisitions – see F17 Tenders and Quotations – see F18	Public	Originating	Electronic and Physical	E + 1
A15	Vendors and Suppliers	Includes records regarding vendors and suppliers of goods and services as well as information about these goods and services, such as catalogues, price lists, correspondence, and bidders' information sheets. EXCLUDES: Purchase Orders and Requisitions - see F17 Office Equipment - owned and leased - see A07 Fleet Management - see V01	Public	Originating	Electronic and Physical	2
A16	Intergovernmental Relations	Includes correspondence and other records of a general nature regarding the relationship between the municipality and all other levels of government (such as telephone numbers, contact names, etc.). May include correspondence to and from Boards and Commissions. Where possible, these records should be filed by their subject, not the originator or recipient of the report and/or correspondence.	Confidential	Originating	Electronic and Physical	5
A17	Information Access and Privacy	Includes documents regarding the municipality's responsibilities under the Municipal Freedom of Information and Protection of Privacy Act (MFIPPA) and records regarding the handling of requests under the Act. Includes routine disclosure requests and processing, notices of disclosure, responses to FOI request made to the municipality, access request transfers to another institution, FOI requests made by the municipality, notices of appeal and privacy breach investigation/processing. Also includes lists of Personal Information Banks (PIBs). EXCLUDES: Non-MFIPPA Complaints and Inquiries - see M04	Restricted	Clerk's	Electronic and Physical	2
A17A	Privacy Impact Assessments	Includes records produced as part of the Privacy Impact Assessments process. Includes checklist, questionnaire, recommendations and any supporting documentation. And any information provided to identify and evaluate the potential risk associated with the project, program, technology system or process.	Restricted	Clerk's	Electronic and Physical	E+1
A18	Security	Includes reports, requests, logs, and other records regarding the security of offices/facilities and properties such as security passes, video surveillance logs, records and reports, and control of keys. Includes department sign in/out logs. EXCLUDES: Computer Data Security - see A03 Vandalism Reports - see P05 Video Surveillance Recordings - A18A	Confidential	Clerk's	Electronic and Physical	5

Class Code	Secondary Heading	Scope Notes*	Security Classification	Responsible Dept.	Record Format	Total Retention Noted in Years LEGEND: P= PERMANENT, S= SUPERSEDED, E=EVENT
A18A	Video Surveillance Recordings	Video surveillance recordings EXCLUDES: Vandalism Reports - see P05 Computer Security - see A03 Security Records - See A18	Confidential	Originating	Electronic and Physical	E+14 days
A19	Facilities Construction and Renovations	Includes records for the planning, design and construction of municipal facilities such as fire stations, libraries, landfills, water and wastewater plants, warehouses, and office buildings. Includes correspondence, minutes of site meetings, consultant and costing reports, design, inspections and site safety certifications of equipment such as scaffolds and safety platforms for construction sites controlled by the municipality. E= Project Completion EXCLUDES: As-Builts and drawings - see A27	Confidential	Originating	Electronic and Physical	E +15
A20	Building and Property Maintenance	Includes records regarding the maintenance/management of municipal buildings and properties such as cemeteries, garages, libraries and office buildings. Includes exterior maintenance to buildings, landscaping, grounds keeping and grass cutting. Also includes interior design of buildings, including floor layouts, office cleaning and pest control as well as licenses for devices such as elevators. E= Records retained until equipment is removed, plus one year. EXCLUDES: Parks Management - See R04 Building Systems - See A26	Confidential	Originating	Electronic and Physical	E + 1
A21	Facilities Bookings	Includes copies of permits and bookings issued for the rental of recreational and administrative facilities for specific activities and equipment. Includes harbour slip rentals.	Confidential	Originating	Electronic and Physical	2
A22	Accessibility of Services	Includes records relating to the accessibility of Municipal buildings, services and information to disabled persons. Includes multi-year accessibility plan, efforts to remove barriers and notices of availability of these services. EXCLUDES: Report on services - see A25	Public	Human Resources	Electronic and Physical	P
A23	Information Systems Production Activity & Control	Includes records relating to computer system operations and backup tapes. Includes activity logs, help desk tickets, change control sheets, change orders, file access control reports and system changes.	Confidential	IT	Electronic and Physical	E+2
A24	Access Control & Passwords	Records related to the management of and access to programs. Includes individual access, password management, etc.	Confidential	IT	Electronic and Physical	Superseded
A25	Performance Management / Quality Assurance	Includes records regarding the performance of the Municipality as a whole and quality assurance programs such as the Ontario Municipal Benchmarking Initiative (OMBI), Excellence Canada (formerly the National Quality Institute), Benchmarking, and Balanced Score Cards. Types of records included are key performance indicators, annual reports submitted to a Ministry such as the Leaf and Yard Waste System Annual Waste Reduction Reports, Waste Recycling Sites Annual Report, drinking water system annual report, Long-Term Care Home Licensee Annual Report, Personal Health Information Annual Report, Housing Services Annual Report, Funding Agencies Annual Report, and other information related to the efficiency and effectiveness of municipal operations as designated by a Ministry. EXCLUDES: Employee performance appraisal - see H03 Council Goals & Objectives - see C08 Financial Regulatory reporting, FIR and MPMP – see F27	Public	Originating	Electronic and Physical	6

By-law 2024-82
SCHEDULE "A"

Class Code	Secondary Heading	Scope Notes*	Security Classification	Responsible Dept.	Record Format	Total Retention Noted in Years LEGEND: P= PERMANENT, S= SUPERSEDED, E=EVENT
A26	Building Structure Systems	Includes records regarding building systems that are part of the building structure such as HVAC, ventilation, fire and life systems, electrical safety, elevators, furnace, and emergency lighting. Includes manufacturer's operation/technical manuals and warranties; inspection and testing reports; approved life safety studies, approved compliance equivalencies, inspection log books and remedial action for building systems.	Confidential	Originating	Electronic and Physical	Superseded or life of system/asset
A27	Drawings	Includes architectural and engineering drawings and As-Built drawings and supporting documentation such as specifications required to interpret the drawings and identify the current state of a facility or infrastructure for assessment, rehabilitation and warranty support purposes. NOTE: Retention is permanent or life of the system/asset, plus five years	Confidential	Originating	Electronic and Physical	P
C01	By-Laws	Includes final versions of the municipality's by-laws and amendments and attachments that are legally part of the by-laws. Also includes any background documentation required to explain or justify the By-Law.	Public	Clerk's	Electronic and Physical	P
C02	By-Laws - Other Municipalities - Do Not Use	USE REF for these items				
C03	Council Agendas, Reports to Council and Council Resolutions	Includes notices of meetings, Agenda of Council meetings as well as working notes used in agenda preparation. Includes Staff Reports to Council and Council resolutions. NOTE: Paper copies retained for one year. Electronic are PERMANENT	Public	Clerk's	Electronic and Physical	P
C04	Council Minutes	Includes minutes of the proceedings of Council meetings. Includes attachments to the minutes and voting records. EXCLUDES: Council Committees - see C05, C06 Reports to Council - see C03	Public	Clerk's	Electronic and Physical	P
C05	Council Committee Agendas, Reports to Committees and Committee Resolutions	Includes notices of meetings and agendas for the committees of Council as well as working notes used in agenda preparation. Includes Staff Reports to the Committees of Council. NOTE: Paper copies retained for one year, Electronic are PERMANENT	Public	Clerk's	Electronic and Physical	P
C06	Council Committee Minutes	Includes minutes of the committees of Council and copies of Local Board Minutes that members of Council belong to.	Public	Clerk's	Electronic and Physical	P
C07	Elections	Includes returned notices, lists of officials, initial MPAC and amended voters' lists, change of name applications, nominations, notices, election results, preliminary voters' lists, objections lists, candidate compliance reports, third party campaign financial and auditor reports, election report, election coordination documentation, oaths taken by council members and information on ward boundaries. Includes advertising.	Confidential	Clerk's	Electronic and Physical	E+4
C07A	Elections	Ballots	Confidential	Clerk's	Electronic and Physical	E+120 Days
C08	Council Goals and Objectives	Includes records concerning strategic planning, goals and objectives such as shared services and mission statements such as the municipal sustainability plan housing plan, and growth plan submissions prepared for the Ministry. EXCLUDES: Environmental Planning – see D03 Official Plan – see D08	Public	Originating	Electronic and Physical	10

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C09	Motions and Resolutions	DO NOT USE THIS CODE - See C03 for Council Resolutions See C05 for Committee of Council Resolutions				
C10	Motions and Resolutions - Other Municipalities - DO NOT USE	USE REF - Includes final versions of motions and resolutions of other municipalities which are of interest.				
C11	Reports to Council	Includes the listing of all departmental reports to Council or Committees of Council such as staff reports, the Treasurer's agreements, investments and funds disposition reports. EXCLUDES: See C03 for Staff Reports to Council See C05 for Staff Reports to Committees of Council	Public/ Confidential	Clerk's	Electronic and Physical	P
C12	Appointments to Boards and Committees	Includes records related to the appointments of Council Members to Boards and Committees	Public	Clerk's	Electronic and Physical	P
C13	Accountability Transparency & Governance	Includes records relating to Council Code of Conduct complaints and related investigations, Integrity Officer appointments and reports (including Integrity Commissioner reports, Ombudsman investigations and reports), closed meeting investigations and initiatives., registry of lobbyists, etc. EXCLUDES: Conflict of Interest Declarations - See C13A	Confidential	Clerk's	Electronic and Physical	5
C13A	Conflict of Interest Declarations	Includes declarations from member of Council/Committees/Boards that have declared a conflict of interest to a matter being discussed. Also includes registry of same.	Public	Clerk's	Electronic and Physical	P
D01	Demographic Studies	Includes records regarding trends in population growth, census reports, and density studies. Also includes records regarding the type, level and rate of growth of employment, unemployment statistics, composition of the workforce, etc. EXCLUDES: Vital Statistics - see L12	Public	Originating	Electronic and Physical	10
D02	Economic Development	Includes records regarding the growth of the economy and economic trends. Includes studies, statistics, projections, etc. EXCLUDES: Demographic Studies - see D01 Residential Development - see D04 Tourism Development - see D06 Industrial/Commercial Development - see D21	Confidential	Originating	Electronic and Physical	10
D03	Environment Planning	Includes records regarding general types of environmental studies with a long-range planning emphasis, such as salt usage impact, storm drainage and flood control, parks and open spaces, water sustainability and conservation, pollution prevention and waste management planning. Also contains information on invasive species and source water protection such as risk assessments, well development and purging, risk management plans, site condition reports and information prepared for Phase One and Phase Two environmental assessments. EXCLUDES: Environmental Monitoring - see E05, E13 - E15 Waste Management - see E07 Source Water Protection Committee- see E20	Confidential	Originating	Electronic and Physical	15
D04	Residential Development	Includes records regarding the availability of housing. Includes general assessments of the need for affordable housing, occupancy rates, housing cost statistics, etc.	Confidential	Originating	Electronic and Physical	10

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D05	Natural Resources Planning	Includes records regarding planning for the management and preservation of forests, natural features, the characteristics of various minerals as well as mineral deposits, and other natural resources information. EXCLUDES: Tree maintenance – see E04 Natural Resource management and preservation – see E18	Public	Originating	Electronic and Physical	5
D06	Tourism Development	Includes records regarding the tourism industry and efforts made to promote and encourage tourism such as the use of the municipality as a convention site or special event.	Confidential	Communications & Economic Development	Electronic and Physical	10
D07	Condominium Plans	Includes records regarding the pre-consultation and the approval of plans of condominiums. Includes drawings, technical reports, and correspondence, written comments, working notes, background information and applications. Applications = 2 years after final decision	Public	Planning	Electronic and Physical	P
D08	Official Plans	Includes the official plan, and exemptions and amendments to the official plan. Also includes secondary plans and amendments, containing detailed objectives and policies concerning the planning, development, and redevelopment of specific planning districts.	Public	Planning	Electronic and Physical	P
D09	Official Plan Amendment Applications	Includes the pre-consultation and applications to amend the official plan or secondary plans, staff reports, meeting minutes and written comments on the application, notices, resolutions and decisions. E= Final decision or reflected in revised Official Plan	Public	Planning	Electronic and Physical	E+5
D10	Severances	Includes records regarding the granting of severances to parcels of land including application for severance. E= Land Titles Registration	Public	Planning	Electronic and Physical	E+6
D11	Site Plan Control	Includes records regarding approval for the provision of services to individual land sites. Includes water, sewage, utility approvals, comments and correspondence. Also includes correspondence regarding parking areas, drainage and driveways. NOTE: Applications retained for 2 years after final decision EXCLUDES: Systems for Servicing Land - see relevant subject Site Plan Agreements - see L04	Public	Planning	Electronic and Physical	P
D12	Subdivision Plans	Includes records regarding the pre-consultation and the approval of plans of subdivisions (both residential and commercial). Includes drawings, technical reports, correspondence, written comments, working notes and background information. Includes clearance letters, draft approved plans and "red line" revisions, applications, registered plans, and changes to approved plans. Also includes notices of approval. NOTE: Application is retained for two years after final decision EXCLUDES: Subdivision Agreements - see L04	Public	Planning	Electronic and Physical	P
D13	Variance Applications	Includes records regarding the pre-consultation and the granting of minor variances in land use including zoning applications from existing zoning regulations. EXCLUDES: Budget Variances - see F05	Public	Planning	Electronic and Physical	P
D14	Zoning	Includes records and standards regarding the designation of zones for land use planning purposes and zoning applications for other municipalities. E= Final decision plus two years EXCLUDES: Zoning By-Laws - see C01 Variances - see D13	Public	Planning	Electronic and Physical	E+2

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D15	Easements	Includes all records on Rights of Way and Easements concerning municipal ownership of private lands in order to maintain public service such as water and sewer lines that cross private property. E= Termination of right of easement EXCLUDES: Original Agreements - see L04	Public	Planning	Electronic and Physical	E + 6
D16	Encroachments	Includes all records regarding private properties encroaching on municipal lands including encroachment permits. Also includes surveys and any other related documentation. Includes Municipal Land Use Permits E= Termination of right of encroachment EXCLUDES: Original Agreements - see L04 Original Encroachment By-Laws - see C01	Public	Originating	Electronic and Physical	E+6
D17	Annexation/ Amalgamation	Includes all records pertaining to the annexing and amalgamating of land adjacent to municipal lands to accommodate growth. Also includes amalgamation of municipalities. May include studies on county restructuring.	Public	Clerk's	Electronic and Physical	P
D18	Community Improvement	Includes records, studies, statistics and any required background information on community development programs. Examples include Ontario Neighbourhood Improvement Programs, Community Area Improvement Programs, BIA, BIC, PRID, etc. May also include records on housing rehabilitation programs, ie. RRAP, CMHC. E= Completion of project EXCLUDES: Economic Development - see D02	Public	Originating	Electronic and Physical	E+6
D19	Municipal Addressing	Includes records regarding requests for and assignment of new subdivision and other street names and numbers. May include correspondence, reports, drawings, and copies of related by-laws. E= Superseded	Public	Planning	Electronic and Physical	E+10
D20	Reference Plans	Includes Registered Deposit Plans (RD Plans), site plans, property survey plans as received from Registry Office. May include correspondence.	Public	Clerk's	Electronic and Physical	P
D21	Industrial/ Commercial Development	Includes records regarding promotion and development of industry and commerce. Records include studies, statistics, projections, etc. EXCLUDES: Agricultural Development – see D23	Confidential	Planning	Electronic and Physical	10
D22	Digital Mapping	Includes all records used to produce maps and updates in a digital format. E= Superseded	Public	Planning	Electronic and Physical	E + 10
D23	Agricultural Development	Includes all records regarding development of agricultural growth.	Public	Planning	Electronic and Physical	10
D24	Official Plan Background	Includes reports pertaining to amendments and changes to the Official Plan. E= Final decision	Public	Planning	Electronic and Physical	E+5
D25	Deeming Process	Includes records regarding applications and background material for Deeming By-law applications, including Council decisions, by-laws, correspondence, etc. A Deeming By-law application is applied for in order to allow for two or more neighbouring lots on a registered plan of subdivision to merge. Only applicable to parcels of land contained within a plan of subdivision that has been registered for at least 8 years. E= Final decision	Confidential	Planning	Electronic and Physical	E+2

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D26	Development Charges Study	Includes records related to the development of the final Development Charges Study as required under the Development Charges Act. Includes advertising, public meeting notices, responses, stakeholder lists, public meeting information, background information and supporting documentation, consultant reports, notices regarding adoption of the Development Charges By-law, and other records related to requirements for the development of the Development Charges By-law.	Public	Planning	Electronic and Physical	E+15
D27	Part Lot Control	Includes records regarding applications and background material for Part Lot Control exemptions, council decisions, by-law, correspondence, etc. A Part Lot Control application is applied for to allow the conveyance of a portion of a lot without requiring approval of a land division committee (typically used to separately convey semi-detached and townhouse units). Only applicable to parcels of land contained with a registered plan of subdivision. E= Final decision	Confidential	Planning	Electronic and Physical	E + 5
E01	Sanitary Sewers	Includes records regarding the design, construction and maintenance of sanitary sewers such as underground conduits that carry of waste matter. NOTE: This code includes Capital Projects that include water, sewer and roads EXCLUDES: Drawings/As Built & Specifications - A27 Waste Management - see E07 Storm Sewers - see E02 Treatment Plants - see E03 MOE approval - see E21	Confidential	Operations	Electronic and Physical	P
E02	Storm Sewers	Includes records regarding the design, construction and maintenance of storm sewers such as underground conduits that carry of drainage water. EXCLUDES: Waste Management - see E07 Sanitary Sewers - see E01 Treatment Plants - see E03 MOE approval - see E21 Capital Projects that include water, sewer and roads - See E01	Confidential	Operations	Electronic and Physical	P
E03	Treatment Plants - Wastewater	Includes records regarding the operation of sewage treatment and pumping stations and lagoons. Includes wastewater treatment facility/collection, identification reports, operator-in-charge records, treatment unit instructions, equipment operating status records and equipment design, construction and maintenance records (work orders) as well as the operations and maintenance manuals. Work orders will include compliance work orders, equipment work orders (WSPM), and general work orders (callouts & site-specific collection-related work (i.e. sewer rodding, lateral inspections, etc.). Also includes facility classification certificate and license to operate. May include records pertaining to Wastewater Treatment Facility and/or Collection upgrades design, construction and commissioning. E= Retain for life of equipment EXCLUDES: Private Sewage Disposal Systems – see E12 Drawings/ As Built and specifications – see A27 MOE Approvals - see E21	Confidential	Operations	Electronic and Physical	E+5
E03A	Treatment Plants - Wastewater	Wastewater Specifications	Confidential	Operations	Electronic and Physical	E+P
E04	Tree Maintenance	Includes records of tree removal, planting, trimming, pruning and preservation measures taken.	Public	Operations	Electronic and Physical	5

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E05	Air Quality Monitoring	Includes records regarding the routine monitoring of air quality as well as responses to interference with quality or quantity from pollution sources such as smoke, dust, smog or gaseous impurities. Also includes claims and compliance orders. E= Later of date of offence, or day of evidence of offence first came to attention appointed under s.5 EXCLUDES: Drawngs/As Builts and Specifications - See A27 Water Quality – see E13 to E15 By-Law Enforcement - see P01 Complaints and Inquiries - see M04 Land Quality Monitoring – see E23 MOE Approvals - see E21	Confidential	Operations	Electronic and Physical	E+5
E06	Utilities	Includes maps and location drawings provided to the municipality from utility companies such as telephone lines, gas mains, power lines, water mains etc. EXCLUDES: Site Plans - see D11	Confidential	Operations	Electronic and Physical	5
E07	Waste Management	Includes records regarding the collection and disposal of waste. Includes site operating plans, landfill site records, facility inspections and stack testing, recycling, energy from waste, source separation, collection services, recycling site vicinity maps, hazardous waste collection, hauled sewage waste collection and composting records. Also includes transportation manifests, transfer compliance records and records of site condition, daily waste reception and inspection records, dust suppression records and closure reports. E = Post Landfill site closure documentation EXCLUDES: Sanitary Sewers - see E01 Environment Planning - see D03 Private Sewage Disposal Systems – see E12 Annual reports on blue boxes, recycling program, etc. – see A25	Confidential	Operations	Electronic and Physical	E+25
E08	Water Operations – Drinking Water Plant	Includes records regarding the design, construction and maintenance of water mains, tanks, pipelines, hydrants and related facilities and equipment as well as operational plans. Includes water meter registration numbers. Includes point of entry water treatment record, operator in charge shift monitoring and inspection records, water treatment facility/distribution and equipment design, construction, manuals, process adjustment records and maintenance records (work orders). Work orders will include compliance work orders, equipment work orders (WSPM), and general work orders (callouts & site-specific distribution-related work (i.e. water meters, curb stops, etc.) May include records pertaining to Water Treatment Facility and/or Distribution upgrades design, construction and commissioning and operations manuals for equipment. Also includes notices of potential problems and disinfection equipment continuous performance records. E = Superseded EXCLUDES: Water Pumping Stations – see E03 Drawings/ As Builts and specifications – see A27 MOE Approval - see E21	Confidential	Operations	Electronic and Physical	E + 15 Years
E09	Drains	Includes records regarding the design, construction and maintenance of drains (channel or pip) carrying surplus liquid such as rainwater or liquid waste, usually to a sewer. Also includes engineer reports, petitions, assessments, general specifications and correspondence. May include convenience copies of tenders, bylaws and grants. E = Superseded EXCLUDES: Drawings/ As Builts and specifications – see A27	Confidential	Operations	Electronic and Physical	E+5

Class Code	Secondary Heading	Scope Notes*	Security Classification	Responsible Dept.	Record Format	Total Retention Noted in Years LEGEND: P= PERMANENT, S= SUPERSEDED, E=EVENT
E10	Pits and Quarries	Includes records regarding the design, construction, maintenance and monitoring of all pits and quarries. Includes engineer's reports, assessments, general specifications and correspondence. E = Superseded EXCLUDES: Drawings / As Built and Specifications - See A27 License/permits – see P09	Confidential	Originating	Electronic and Physical	E + 5
E11	Nutrient Management	Includes the records regarding the control of storing/spreading /using waste materials such as liquid manure and sewage bio-solids on land, near waterways, runoff etc. Includes the agricultural management strategy/plan, the Greenhouse Nutrient Feedwater Strategy, Site Characterization Plan, documentation relating to the storage and distribution of nutrient material, non-agricultural source material (NASM) plans and sampling results. Also includes broker transfer and hauled sewage disposal site records. E = Superseded EXCLUDES: Strategy/plan review – see A25	Confidential	Operations	Electronic and Physical	E + 5
E12	Private Sewage Disposal Systems	Includes records regarding the design, construction, maintenance and monitoring of private sanitary sewers and septic systems. E = Superseded EXCLUDES: Drawings / As Built and Specifications - See A27	Confidential	Building	Electronic and Physical	E+7
E13	Water Monitoring	Includes records regarding the routine monitoring of water quality, water quantity for source water protection purposes, as well as warning notice checks and posting of them and responses to interference with quality or quantity such as and chemical samples collected quarterly (trihalomethanes, nitrate and nitrites), water taking logs, methodology and reports. Also includes monitoring and control of creeks and floods, weeds, noise, erosion, top soil and storm water. Includes records of Ministry of the Environment drinking water and waste water Compliance Inspection Reports, data request items, inspection responses and related documents. E = Created, approved or plan no longer in force EXCLUDES: Air Quality Monitoring – see E05 Land Quality Monitoring – see E23 By-Law Enforcement - see P01 Complaints and Inquiries - see M04 Annual reports – see A25	Public	Planning	Electronic and Physical	E+ 15
E14	Water Sampling	Includes operational checks, weekly and monthly microbiological sampling and testing, chain of custodies, report of analysis – adverse samples, notices to Ministry – Spills Action Centre and local Health Unit. Includes hydrocarbon records, drinking Water and Wastewater routine sampling and Determination results, systems effluent information records, sewer overflow reports, CoC and laboratory related communications or documentation (LSN, Scope of Accreditation & Procedures/Requirements). Includes phosphorous content records, Hydrocarbon records of Upset Condition and Spill Reports for Wastewater Treatment and/or Collection systems to Ministry of the Environment and local Health Unit. Note: Child care facility plumbing flush and water testing = 6 years E = Created, approved or plan no longer in force EXCLUDES: Air Quality Monitoring – see E05 By-Law Enforcement - see P01 Complaints and Inquiries - see M04 Facilities Routine water use, monitoring & testing – see P21	Public	Operations	Electronic and Physical	E + 15

Class Code	Secondary Heading	Scope Notes*	Security Classification	Responsible Dept.	Record Format	Total Retention Noted in Years LEGEND: P= PERMANENT, S= SUPERSEDED, E=EVENT
E15	Chemical Sampling of Water	Includes chemical samples collected and tested, inorganic and organics, samples collected and tested every 60 months and lead, sodium and fluoride samples collected and tested annually, and engineer evaluation and corrective action reports and pesticide parameter test results. E = Created, approved or plan no longer in force EXCLUDES: Air Quality Monitoring – see E05 By-Law Enforcement - see P01 Complaints and Inquiries - see M04 Facilities Routine water use, monitoring & testing – see P21	Public	Operations	Electronic and Physical	E +15
E16	Backflow Prevention and Cross Connection Control	Includes records relating to backflow prevention and cross connection control By-law program. Records will include: cross connection surveys, test reports and test results, inspection reports, list of approved and installed backflow prevention devices/assemblies, compliance tracking and notifications; plumbing drawings/schematics; correspondence, forms, copies of work orders, job reports, copies of invoices, fees structures and any other type of media related directly to backflow prevention and cross connection control. E = Superseded	Confidential	Operations	Electronic and Physical	E+ 15
E17	Energy Management	Includes all records relating to the municipality's Energy Management Program. Includes published annual energy plans, copies of utility invoices and consumption profiles, commodity procurement strategies, energy related feasibility studies, audit reports and retro-fit project files and reports and records pertaining to the benchmarking of energy cost and consumption and greenhouse gas emissions. Also includes conservation and demand measures information and management of energy consumption and conservation at municipal buildings and facilities. E = End of reporting period to which it relates	Public	Originating	Electronic and Physical	E+7
E18	Natural Heritage	Includes records regarding green lands, municipal forests and forestry including tree by-law preparation and enforcement records. Also includes records relating to the management and preservation of parks, harbours and beaches and plans to manage, control or eradicate invasive species or prevent release. E = End of plan or designated year EXCLUDES: • Natural Resources Planning – see D05 • Tree Maintenance – see E04 • Conservation district plans – see R01 Archaeological and heritage site investigation reports – see R01	Public	Operations	Electronic and Physical	E+3
E19	Renewable Energy	Includes data, applications, standards, monitoring and reports/studies regarding renewable energy facilities powered and renewed by natural processes (e.g., wind, water, biomass, biogas, biofuel, solar energy, geothermal energy and such other energy sources as may be prescribed by senior governments) and their environmental and public health impacts. Also includes reports on hazards to birds and bats monitoring and locations of wind turbines as well as land requirement transfers. E = Created, approved or facility no longer in force	Confidential	Originating	Electronic and Physical	E+15

Class Code	Secondary Heading	Scope Notes*	Security Classification	Responsible Dept.	Record Format	Total Retention Noted in Years LEGEND: P= PERMANENT, S= SUPERSEDED, E=EVENT
E20	Source Water Protection	Includes Risk Management Official and Inspector appointment certificates and the Risk Management Official's Annual Report, fee schedules for risk management applications, plans, issuing of notices or compliance orders or the acceptance of an assessment. Also includes modelling analysis, vulnerability assessments, source protection area assessment reports and comments, technical studies and Significant Drinking Water Threat (SDWT) verification surveys. Includes Source Water Protection Committee's Terms of Reference and Meeting Minutes. E = Created, approved or plan no longer in force EXCLUDES: Risk Management Plans and/or Assessments - see D03 Prohibition Notices and Orders - P20 Contracts and Agreements - Simple (Not Under Seal) - L14 Soil Contamination – E23 Nutrient Management – E11	Confidential	Originating	Electronic and Physical	E + 15
E21	MOE Environmental Compliance Approvals	Includes Environmental Compliances issued by Ministry of Environment (MOE) to the municipality for municipal drinking water systems, municipal & private sewage works and waste disposal sites, air quality, noise, storm-water management, storm sewers, culverts, etc. E = Cease to apply	Public	Operations	Electronic and Physical	E+3
E22	Private/Small Water Systems	Includes records and correspondence regarding the design, construction, operation and maintenance of private water systems and development agreements for private waterworks. Includes operating manuals, maintenance orders, maintenance logs, warning notice checks and system audit reports. E = As long as equipment in use	Confidential	Operations	Electronic and Physical	E+15
E23	Land Quality Monitoring	Includes records regarding the routine monitoring of land/soil quality and site condition reports as well as responses to interference with quality or contamination. E = Superseded EXCLUDES: Water Quality – see E13 to E15 By-Law Enforcement - see P01 Complaints and Inquiries - see M04 Air Quality Monitoring – see E05 Natural Heritage – E18	Confidential	Operations	Electronic and Physical	E + 7
E24	Gasoline Storage and Dispensing	Includes gasoline storage tank and municipal gasoline dispensing records. Routine monitoring and dispensing records relate to loading and dispensing throughput volume; vapour control equipment operation, daily/weekly visual inspection/deficiency remedy actions and maintenance; Free Oil Layer and Separated Solid Layers Measurements and removal records measurements; tank bottom water removal; temporary tank removal; Loss of Product / Inventory Control and Reconciliation Records; excavation and nearby construction potentially affecting the storage tank system integrity; vapour, equipment downtime record; pumping equipment tests; pumping connection leak records; storage leak tests; gasoline levels measurement, and loss and gain records; and piping system pressure tests. System records relate to drawings and specifications for system; installation record; tank and piping systems locates; storage tank and Stage II vapour recovery system commissioning inspection and testing records; and storage tank component inspection reports and compliance documents (including warnings and notices of violations). E = Tank install, inspection = system removed EXCLUDES: Underground storage abandonment record – see L07 Major spills – see F23	Confidential	Originating	Electronic and Physical	E + 7

Class Code	Secondary Heading	Scope Notes*	Security Classification	Responsible Dept.	Record Format	Total Retention Noted in Years LEGEND: P= PERMANENT, S= SUPERSEDED, E=EVENT
F01	Accounts Payable	Includes records documenting funds payable by the municipality, such as paid invoices, receipts, copies of cheques issued to pay account, rebates, levies payable, reports, telephone bills and membership fees. NOTE: Paper copies retained for just one year following completion of the subject year's audit E = Close of Fiscal Tax Year End EXCLUDES: Cancelled Cheques - see F07 Employee and council expenses – see F09	Public	Finance	Electronic and Physical	E + 7
F02	Accounts Receivable	Includes records documenting funds owing to the municipality, such as invoices, billing listings, requests from mortgage companies and recoveries reports. Includes correspondence related to tax collection and supporting documentation. E = Close of Fiscal Tax Year End EXCLUDES: Write-offs - see F23 Tax Assessments, Rolls and Tax Arrears - see F22	Public	Finance	Electronic and Physical	E + 7
F03	Audits	Includes records regarding internal and external financial audits of accounts. EXCLUDES: Operational audits - see relevant subject. Audited Financial Statements - see Financial Statements, F10	Confidential	Finance	Electronic and Physical	E+6
F04	Banking	Includes records regarding banking transactions and relationships with banks. Includes bank reconciliations and deposit records. E = Close of fiscal tax year end EXCLUDES: Banking Statements - see F07	Confidential	Finance	Electronic and Physical	E + 7
F05	Budgets and Estimates	Includes departmental and corporate budgets and plans, both capital and operating. Includes all working notes, calculations and background documentation. Also includes Budget Variances.	Confidential	Finance	Electronic and Physical	6
F06	Assets	Includes records regarding current and fixed assets. Includes fixed asset inventory including records of initial expenditure, depreciation, amortization, and disposal. Also includes supporting information required for Public Sector Accounting (PSAB) purposes. E = Disposal of asset EXCLUDES: Land Acquisition and Sale - see L07	Confidential	Finance	Electronic and Physical	E+10
F07	Cheques	Includes all cancelled cheques issued. Also includes cheque requisitions, cheque listings, and supporting documents used to authorize issuance of cheques, N.S.F. cheques and bank statements. EXCLUDES: Banking - see F04	Public	Finance	Electronic and Physical	6

Class Code	Secondary Heading	Scope Notes*	Security Classification	Responsible Dept.	Record Format	Total Retention Noted in Years LEGEND: P= PERMANENT, S= SUPERSEDED, E=EVENT
F08	Debentures and Bonds	Includes records regarding debentures and bonds issued. Includes information regarding the initial issuance of the debenture or bond as well as all records of payments made to investors. E = Debentures surrendered for exchange / cancellation EXCLUDES: Debenture Registers - see Subsidiary Ledgers, Registers and Journals, F14	Public	Finance	Electronic and Physical	E+6
F09	Employee and Council Expenses	Includes travel and meeting expense statements and all receipts submitted by employees or Council and Committee members to substantiate their claims. May include Credit Card information i.e. account numbers and statements etc. May also include employee time sheets combined with travel and expense statements. E = Close of fiscal tax yer EXCLUDES: Attendance - see H01 Honoraria and fees to Council – see F16	Public	Finance	Electronic and Physical	E + 7
F10	Financial Statements	Includes the Balance Sheet, Income Statement and Statement of Source and Application of Funds. Also includes audited financial statements. EXCLUDES: all working notes, calculations and background documentation, see F26	Public	Finance	Electronic and Physical	P
F11	Grants and Loans	Includes records regarding revenue generated in the form of grants-in-lieu, provincial and federal grants, loans and subsidies such as the Road and Farm Tax Rebate, Waste Management Improvement Program etc. Also includes submissions, acknowledgements, and reports such as market value of assistance report. E = Repayment of loan	Confidential	Finance	Electronic and Physical	E+6
F12	Investments	Includes records regarding the municipality's investments, term deposits, and promissory notes. E = Closure of account	Public	Finance	Electronic and Physical	E+6
F13	Journal Vouchers	Includes completed journal voucher forms, input forms, and all background documentation used to substantiate journal entries. E = Close of fiscal tax year	Confidential	Finance	Electronic and Physical	E + 6
F14	Subsidiary Ledgers, Registers and Journals	Includes all subsidiary ledgers, registers, and Journals such as Payment and Receipt Journals, Payroll Registers, and Debenture Registers. E = Close of fiscal tax year EXCLUDES: Documents and vouchers used to support entries - see relevant subject in this Primary.	Public	Finance	Electronic and Physical	E + 7
F15	General Ledgers and Journals	Includes all records in the Books of Original Entry.	Public	Finance	Electronic and Physical	P
F16	Payroll	Includes all records of payments of salary, wages and deductions to employees including vacation entitlement and pay, alternative vacation entitlements, notice of garnishment and termination or severance pay. Includes time sheets and vacation taken, pay lists, Blue Cross reconciliations, T4 Slips, Record of Earnings for pension contribution purposes, Records of Employment (ROE) and Statistics Canada reports. Also includes honoraria and fees to Council. EXCLUDES: Payroll Registers - Subsidiary Ledgers, Registers and Journals - see F14 Non-payroll related government and statistical reporting – see F27	Confidential	Human Resources	Electronic and Physical	P

Class Code	Secondary Heading	Scope Notes*	Security Classification	Responsible Dept.	Record Format	Total Retention Noted in Years LEGEND: P= PERMANENT, S= SUPERSEDED, E=EVENT
F17	Purchase Orders and Requisitions	Includes purchase orders and requisitions, blanket orders, and all background documentation authorizing the procurement of goods and services. E = Close of fiscal tax year EXCLUDES: Quotations and Tenders - see F18	Confidential	Finance	Electronic and Physical	E+7
F18	Quotations and Tenders	Includes records regarding quotations and tenders obtained from suppliers of goods and services. Includes Requests for Proposal, Invitations to Tender, Proposals, Tender Submissions, Pre-qualifications, and all documentation regarding the selection process. E = Contract Award. NOTE: Unsuccessful bids = 1 year from Contract Award EXCLUDES: Successful quotations and tenders - see Contracts and Agreements, L04	Confidential	Finance	Electronic and Physical	E +7
F19	Receipts	Includes receipts issued for payment of items such as licenses, rentals and taxes and for charitable donations made to the municipality.	Public	Finance	Electronic and Physical	7
F20	Reserve Funds	Includes records documenting obligatory and/or discretionary reserve funds such as reserves for working funds, contingencies, future capital projects, and information systems, etc.	Confidential	Finance	Electronic and Physical	6
F21	Revenues	Includes records regarding the generation of revenues other than taxes such as development charges and building code principal authorities authorized fees. NOTE: Records relating to mortgages must be kept for 10 years EXCLUDES: Accounts Receivable - see F02 Tax Rolls - see F22	Confidential	Finance	Electronic and Physical	7
F22	Taxes and Records	Includes taxation records of long term importance, such as assessment rolls, tax sale records, tax sale deeds, property tax registrations, tax arrears register cards and tax collector's rolls. EXCLUDES: Accounts Receivable - see F02 Mortgage Companies - see F02 Correspondence related to tax issues that are not of a long term importance - see F02	Confidential	Clerk's	Electronic and Physical	P
F23	Write Offs	Includes accounts receivable that have been written off as uncollectible. Also includes records of bankruptcies. NOTE: Court services write-offs = 37 years EXCLUDES: Accounts Receivable - see F02	Confidential	Finance	Electronic and Physical	6 years
F24	Trust Funds	Includes records regarding funds established by the municipality for money held in trust, such as bequests, cemetery trust funds, cemetery care and maintenance programs, Homes for the Aged Residents (including authorization, receipts and statements of withdrawal) and Ontario Home Renewal Program such as fund accounting records, bank statements, banking instructions and fund audit records. NOTE: Trust accounts for residents, statements, accounts and records are Permanent	Confidential	Originating	Electronic and Physical	7

Class Code	Secondary Heading	Scope Notes*	Security Classification	Responsible Dept.	Record Format	Total Retention Noted in Years LEGEND: P= PERMANENT, S= SUPERSEDED, E=EVENT
F25	Security Deposit	Includes development deposits, letters of credit, certificates of insurance when required and records of monies held as security (i.e. bonds). E = Closure of Account	Confidential	Finance	Electronic and Physical	E + 6
F26	Working Papers - Financial	Includes all working notes, calculations, reconciliations, end of year payment in lieu of taxes statements to school, and background documentation used to calculate financial statements such as the Monthly Trial Balance. E = After completion of audit EXCLUDES: Financial Statements - see F10	Public	Finance	Electronic and Physical	E+1
F27	Regulatory Reporting – Financial	Includes regulatory, financial information returns and government reporting such as HST returns, tax rebate filings, and the Ministry of Municipal Affairs Financial Information Return (FIR) and the Municipal Performance Measurement Program (MPMP) that collects municipal services data on an annual basis as a part of the FIR. EXCLUDES: Performance management & quality assurance – see A25	Confidential	Finance	Electronic and Physical	6
H01	Attendance and Scheduling	Includes records regarding the planning of employee attendance. This includes dates and times of hours worked and as well as of on-call schedules and any changes made to on-call scheduling including cancellations, and driver daily logs and record of on-duty and off-duty time. Includes statements related to public holiday substitution dates. EXCLUDES: Individual Time Sheets - see F16 Vacation Time and Pay – see F16	Confidential	Human Resources	Electronic and Physical	3 Years Driver's daily logs = 6 months Public vehicle and trips reports = 1 year
H02	Benefits Program	Includes brochures, rates, quotes, correspondence and explanatory documents regarding benefits offered to employees, such as group insurance, dental plans, Canada Savings Bonds, and general information on Employer Health Tax. E = Superseded EXCLUDES: Payroll - see F16 Individual Pension and Benefit records – see H10	Confidential	Human Resources	Electronic and Physical	E + 3
H03	Employee Records	Includes records regarding the employment history of municipal employees. Includes initial resumes and applications, performance evaluations, leave documentation, training reports, correspondence with the employee, employee photos (headshots) and employee assistance. Also includes agreements on extended hours and averaging hours of work, annual summary of hours worked. Includes full-time, part-time, student employees and volunteers. Includes CVOR operator safety record, certificates and licences such as lifeguard, instructor, first aid and retirement home staff certificates; and training records such as working at heights and service station operations training and training certificates for employees related to legislation such as the Safe Drinking Water Act, Environmental Protection Act, Occupational Health and Safety Act and the Ontario Water Resources Act. E = Date employee ceased to be employed by employer EXCLUDES: Grievances – see H14 Harassment – see H15 Health & Safety Training - see H04	Confidential	Human Resources	Electronic and Physical	E + 25

Class Code	Secondary Heading	Scope Notes*	Security Classification	Responsible Dept.	Record Format	Total Retention Noted in Years LEGEND: P= PERMANENT, S= SUPERSEDED, E=EVENT
H04	Health and Safety	<p>Includes records regarding the occupational health and safety of staff. Includes lists of designated substances and assessments, designated substance assessments, fire drill records, ventilation and air quality inspection, fire hydrant flushing, first aid records, non-lost time accident reports, traffic protection plans, portable fire extinguisher maintenance records, chimney test and inspection records, fire safety inspections, safety inspections, Workplace Safety & Insurance Board reports, WSIB certificates, and information on health and safety programs training for staff. Also includes Health & Safety Committee meeting minutes.</p> <p>E = Accident reports for construction projects retained with project one year after project completion</p> <p>EXCLUDES: Accidents of the Public - see P05 Lost-time reports and claims – see H13</p>	Public	Human Resources	Electronic and Physical	E+3
H05	Human Resource Planning	<p>Includes records of succession planning, executive placement, retirement programs, staff turnover rates, staffing level plans, annual hire/promotion targets, recruitment freezes, employment equity, performance management, volunteer plans, employee information reporting and related records.</p> <p>EXCLUDES: Employee Records - see H03</p>	Confidential	Human Resources	Electronic and Physical	5
H06	Job Descriptions	<p>Includes job descriptions and specifications as well as background information used in their preparation or amendment.</p> <p>E = Superseded</p>	Public	Human Resources	Electronic and Physical	E + 1
H07	Labour Relations	<p>Includes records regarding the relationship between labour and management. Includes collective bargaining, correspondence with unions and negotiations.</p> <p>E = Expiry of contract period</p> <p>EXCLUDES: Collective Agreement – see L04</p>	Confidential	Human Resources	Electronic and Physical	E+10
H08	Organization Design	<p>Includes records regarding reporting relationships, reorganization, organizational analysis, etc. Includes organization charts.</p> <p>EXCLUDES: Job Descriptions - see H06</p>	Public	Human Resources	Electronic and Physical	Superseded
H09	Salary Planning	<p>Includes records regarding the planning and scheduling of salaries, such as job evaluations, job classification systems, compensation ranges, salary surveys and schedules. Also includes any reference material retained regarding issues related to pay equity and compliance.</p> <p>EXCLUDES: Employee Records - see H03</p>	Confidential	Human Resources	Electronic and Physical	5
H10	Pension and Benefits Records	<p>Includes records detailing obligations to individuals under OMERS. Includes pension and benefit information of current and retired personnel, including registration/enrolment and records.</p> <p>E = Employee Departure</p> <p>EXCLUDES: Deductions for pensions – see F16 General information on pension plans - H02 Payments made to OMERS - F01</p>	Confidential	Human Resources	Electronic and Physical	E+6

Class Code	Secondary Heading	Scope Notes*	Security Classification	Responsible Dept.	Record Format	Total Retention Noted in Years LEGEND: P= PERMANENT, S= SUPERSEDED, E=EVENT
H11	Recruitment	Includes records regarding the recruitment of staff. Includes job postings, copies of advertisements, records regarding competitions and unsuccessful applications. EXCLUDES: Successful applications – see H03	Confidential	Human Resources	Electronic and Physical	3
H12	Training and Development	Includes records regarding courses offered to employees, and information on career and professional development programs. Also includes orientation and course content delivery materials and attendance records for specific courses. EXCLUDES: Individual Employee Training Records - see H03 Date when that particular course ceases to be offered + 2** salt use training materials – 7 years drinking water training materials– 5 years Only courses developed and presented by the Municipality are subject to archival selection	Public	Human Resources	Electronic and Physical	E+7
H13	Claims	Includes records regarding claims to WSIB or insurance carriers for lost-time incidents, accidents, STD or LTD. Includes accident notice, accident reports. E = Resolution of Claim. NOTE: Hazardous exposure claims = longer of 40 years or 20 years after last record made. EXCLUDES: Non lost-time incidents or accidents - See H04 Self-insured STD – See H04	Confidential	Human Resources	Electronic and Physical	E + 20
H14	Grievances	Includes records dealing with grievance complaints filed against the municipality such as the initial complaint, investigation, reports and final resolution including arbitration and arbitration awards. E = Resolution of Claim EXCLUDES: Harassment & Violence – see H15	Confidential	Human Resources	Electronic and Physical	E+10
H15	Harassment And Violence	Includes records dealing with complaints, including harassments and/or violence complaints, by or against employees of the municipality. It includes documents such as the initial complaint, investigation, reports and final resolution, etc. E = Resolution of Complaint EXCLUDES: Grievances – see H14 Abuse investigation records not involving staff – P08	Confidential	Human Resources	Electronic and Physical	E + 3
H16	Criminal Background Checks	Includes records listing any criminal code convictions that have not been pardoned for all existing and new employees, service providers and volunteers. Also includes annual Criminal-Offence Declaration. E = Date employee ceased to be employed by employer	Restricted	Human Resources	Electronic and Physical	E + 7
H17	Employee Medical Records – Hazardous Materials	Includes records of exposure to asbestos and other hazardous materials. Also includes serious incident and chemical exposure records for firefighters. E = 40 years or 20 years after last record of exposure	Restricted	Human Resources	Electronic and Physical	E+40
H18	Employee Medical Records	Includes doctor's notes, correspondence, and health reports related to an employee's medical situation. E = When STD/LTD claims are resolved	Confidential	Human Resources	Electronic and Physical	E + 3

Class Code	Secondary Heading	Scope Notes*	Security Classification	Responsible Dept.	Record Format	Total Retention Noted in Years LEGEND: P= PERMANENT, S= SUPERSEDED, E=EVENT
H19	Disability Management	Includes all records related to occupational and non-occupational injuries and illnesses. Also includes accommodation records related to permanent impairment under the Human Rights Code resulting in permanent accommodation. E = Day issued or earlier as may be specified by Commission	Restricted	Human Resources	Electronic and Physical	E + 5
H20	Confined Spaces	Includes records relating to the assessment of confined spaces and written plan and procedures for the control of hazards in confined spaces. Also includes confined space atmospheric tests and a record of each worker's entries and exists. E = One year Retention or the period necessary to ensure two most recent records retained EXCLUDES: Health & Safety – see H03 Staff training – see H12	Public	Human Resources	Electronic and Physical	E + 1
H21	Employee Recognition	Includes all records and correspondence related to employee awards and honours granted by the Municipality. Includes: organized employee events such as staff barbecues, retirement celebrations, service awards, recognition parties, etc.	Confidential	Human Resources	Electronic and Physical	5
H22	Employee Certifications	Includes records regarding individual employee certification, credentialing and mandatory training required by legislation or professional standards as a condition of employment. Includes applications, confirmation of mandatory training, certificate renewals and appointment renewals such as fire fighter mandatory training, water quality analyst certificates, sewage works operator certificates and commissioner of oaths appointment. E = Certification expired plus two years	Confidential	Human Resources	Electronic and Physical	E+2
L01	Appeals and Hearings	Includes zoning appeals, development and educational charges appeals, official plan appeals, and Committee of Adjustment appeals. Records include notices of appeal, all transcripts and related documentation regarding appeals, hearings, legal proceedings and final judgments. Also includes orders issued by regulatory bodies and boards. EXCLUDES: Litigation - see Claims - L02-L03 Harassment & Violence – see H15	Confidential	Clerk's	Electronic and Physical	P
L02	Claims Against the Municipality	Includes all litigation and insurance claims made by other parties against the municipality. E= Resolution of claim and all appeals EXCLUDES: Appeals and Hearings - see L01	Confidential	Clerk's	Electronic and Physical	E+15
L03	Claims By the Municipality	Includes all litigation and insurance claims made against other parties by the municipality. E = Resolution of claim and all appeals EXCLUDES: Appeals and Hearings - see L01	Confidential	Clerk's	Electronic and Physical	E + 15

Class Code	Secondary Heading	Scope Notes*	Security Classification	Responsible Dept.	Record Format	Total Retention Noted in Years LEGEND: P= PERMANENT, S= SUPERSEDED, E=EVENT
L04	Contracts and Agreements - Under By-Law	Includes all agreements entered into by the municipality which require a by-law for approval. Includes construction contracts, collective agreements, child care centres/home child care agency licensee agreements, development front-ending agreements, and subdivision agreements. Also includes agreements regarding tax arrears payment extension, easements, encroachments, area ways, laneways and records transfer. EXCLUDES: Office Equipment Maintenance Agreements - see L14 Contracts regarding Land - see L07 Insurance Policies - see L06 Line fence agreements – see P01	Public	Clerk's	Electronic	P
L05	Insurance Appraisals	Includes appraisals of municipal property for insurance purposes. E = After a new appraisal has been done	Confidential	Clerk's	Electronic and Physical	E+15
L06	Insurance Policies	Includes municipal insurance policy documents, such as vehicle, liability, theft, and fire insurance. E = Expiry of Policy EXCLUDES: Employee Group Insurance - see H02 Third Party Contracts - see L04 Insurance Claims – see L03	Public	Clerk's	Electronic and Physical	E + 15
L07	Land Acquisition and Sale	Includes records regarding real estate transactions and conveyance of land such as lot sales, alley closings and allowances whether through voluntary transactions or expropriation. Includes leases, deed including underground storage abandonment record, expropriation plans, purchase letters and appraisals. E = Property disposition. NOTE: Renewable energy project agreement terms may not be more than 50 years.. Append abandoned petroleum storage tank to deed. EXCLUDES: • Tax sales – see F22	Confidential	Clerk's	Electronic and Physical	E+10
L08	Opinions and Briefs	Includes copies of opinions and briefs prepared by the municipality's legal counsel on specific issues and by-laws. E = Superseded	Confidential	Originating	Electronic and Physical	E + 7
L09	Precedents	Includes records regarding judgments and decisions which may affect the municipality's position in actual or potential legal matters	Confidential	Originating	Electronic and Physical	E + 7
L10	Federal Legislation	Please use REF				
L11	Provincial Legislation	Please use REF				
L12	Vital Statistics	Includes registers of births, deaths and marriages. Registers include license or permit serial numbers, date of issue and name of the parties. EXCLUDES: Population Statistics - see Demographic Studies - D01	Restricted	Clerk's	Electronic and Physical	P
L13	Prosecutions	Includes records regarding prosecutions to enforce by-laws and federal and provincial legislation. E = Delivery of judgment EXCLUDES: By-Law Enforcement - see P01 Appeals and Hearings - see L01	Confidential	Originating	Electronic and Physical	E+7

Class Code	Secondary Heading	Scope Notes*	Security Classification	Responsible Dept.	Record Format	Total Retention Noted in Years LEGEND: P= PERMANENT, S= SUPERSEDED, E=EVENT
L14	Contracts and Agreements – Simple	Includes contracts and agreements which do not require by-law approval, such as equipment rental and service contracts and vehicle lease, purchase agreements, waste removal agreements, apprenticeship training contracts, vehicle leases, housing service managers and long-term care home licensee agreements relating to funding, service accountability and charges between licensees and authorized persons or residents. Also includes consents required under The Canadian Anti-Spam Legislation (CASL) E = expiry of contract . NOTE: Long Term Care Service Providers = Permanent EXCLUDES: Contracts and Agreements Under By-Law – L04 Line Fences agreements – see P01	Confidential	Originating	Electronic and Physical	E + 5
M01	Advertising	Includes records regarding public advertising in magazines, newspapers, radio, television, and transit. EXCLUDES: News Releases - see M06 Recruitment - see H11 Elections - see C07	Public	Originating	Electronic and Physical	10
M02	Ceremonies and Events	Includes records regarding participation in special events, openings, and anniversaries, such as Remembrance Day and Winter Carnival. Also includes records regarding the set-up and running of special events. EXCLUDES: Permit to hold event – see P11	Confidential	Originating	Electronic and Physical	E+5
M03	Charitable Campaigns/Fund Raising	Includes records regarding the raising of funds and donations for the municipality, for municipality run programs or for other charitable organizations. This would include the United Way, Cancer Fund, community interest groups, etc. EXCLUDES: Receipts - see F19	Confidential	Originating	Electronic and Physical	2
M04	Complaints and Inquiries	Includes records regarding requests for information, and very general types of inquiries and general complaints related to services provided by the municipality. Also includes concerns about services offered by the municipality and inquiries about council proceedings. May also include compliance letters issued in response to a lawyer's request. E = Date of Complaint/Inquiry. NOTE: Long Term Care Complaints are Permanent EXCLUDES: Accessibility of Records (Freedom of Information) requests - see A17 Grievances or harassment/violence complaints by or against employees – see H14, H15 Employee recognition – see H21	Confidential	Originating	Electronic and Physical	E+5
M04A	Commendations	Includes records regarding commendations for staff and members of Council. Also includes congratulatory letters. EXCLUDES: Accessibility of Records (Freedom of Information) requests - see A17 Grievances or harassment/violence complaints by or against employees – see H14, H15 Employee recognition – see H21	Confidential	Originating	Electronic and Physical	5
M05	News Clippings	Includes clippings from newspapers, information from journals and other printed media. May also include information related to online media coverage, radio or television clips. EXCLUDES: Clippings used as reference material - see relevant subject.	Public	Originating	Electronic and Physical	1

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M06	News Releases	Includes background notes and final versions of news releases issued. Includes messages for inclusion in special event programs.	Public	Originating	Electronic and Physical	5
M07	Publications	Includes typed manuscripts, artwork, printed copies and related records regarding the publication of tourism information, program and services pamphlets, trade shows, current events, industrial directories, business directories, and maps. May include annual reports of a non-financial nature as well as copies of social networking sites (website, Facebook, etc.) published by the municipality. E = Superseded (if the publication is subject to copyright or trademark)	Public	Originating	Electronic and Physical	E+3
M08	Speeches and Presentations	Includes background notes and final versions of speeches, presentations and news conferences given by elected and non-elected officials. EXCLUDES: Media coverage of speeches/presentations - see M05 News Releases - see M06	Public	Originating	Electronic and Physical	3
M09	Visual Identity and Insignia	Includes records regarding branding and the standards which apply to graphic designs as part of a Visual Identity Program. Includes trademarks, logo and letterhead design, signage, flags, vehicle identification, etc. Also includes records regarding corporation insignia and seals of office. E = Superseded	Confidential	Communications & Economic Development	Electronic and Physical	E+5
M10	Website & Social Media Content	Includes records of website content and copies of web pages created by the municipality for general public use. Also includes information on social media sites such as Facebook & Twitter. E = Superseded EXCLUDES: Published website content – see M07	Confidential	Originating	Electronic and Physical	E+2
M11	Public Relations and Public Awareness	Includes outgoing letters of support, congratulations, greetings, honourable achievement awards, welcome letters, etc. Also includes issues regarding internal/external communications. Includes programs designed for public awareness and engagement.	Public	Originating	Electronic and Physical	5
M12	Intellectual Property	Include certificates of copyright, applications for patents and trademark registration. Also includes monitoring and enforcement of authorized use of copyright, trademarks and patents including copyright use permission requests. E = Copyright, patent or trademark expired or last use	Confidential	Clerk's	Electronic and Physical	E+5
P01	By-law Enforcement	Includes records of municipal efforts to enforce bylaws such as parking tickets and fence-line disputes. Includes order to comply, inspection reports, stop work orders, working notes, correspondence, exhibits, photographs, line fence agreements, etc. EXCLUDES: Health & Fire Inspections - see P07 Investigations – see P08 Environmental Monitoring - Industrial/Commercial - see E05 Prosecutions - see L13 Animal Control Enforcement - see P14 Lottery license Enforcement - see P09	Confidential	Originating	Electronic and Physical	6
P02	Daily Occurrence Logs	Includes daily occurrences logs maintained by the Chief Building Official.	Confidential	Originating	Electronic and Physical	5

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P03	Emergency Planning and Response	Includes records regarding the planning, testing, rehearsal of and response to emergency, safety and contingency measures. May also include records of previous disasters including emergency command centre operation, response reports, press clippings, etc. E = Superseded or expiry of plan if Canadian Environmental Protection Act applies	Confidential	Originating	Electronic and Physical	E + 5
P03A	Emergency Response Records	Includes records from a response to an emergency. This includes emergency command centre operations and all other documents related to that function.	Confidential	Originating	Electronic and Physical	E+15
P04	Hazardous Materials	Includes information and reports on chemicals and substances that pose fire or environmental hazards such as PCBs, refrigerants and halocarbons, also includes Material Safety Data Sheets (MSDS) and records dealing with toxic substances control, halocarbon charging records, halocarbon leak tests and release reports, transportation and effects as well as records of pesticide use and environmental spills. EXCLUDES: Staff Safety Training - see H04 Personal exposure - see H17 Manifests - see E07	Confidential	Originating	Electronic and Physical	5
P05	Incident/ Accident Reports	Includes vandalism and security incident reports and reports of accidents that occur at recreational facilities and other municipal properties. EXCLUDES: Security - see A18 Accidents of Municipal Staff - see H04 Compensation claims and vehicle accidents - see L02 or L03 Long Term Care Home medication incidents – see S18 Private Child Care Centre incidents – see S14 Municipal Child Care Centre incidents – see S10	Confidential	Originating	Electronic and Physical	5
P06	Building and Structural Inspections	Includes building and structural tests and inspection reports relating to work platforms; plumbing and sprinkler systems; fire alarm circuits, power supply and system; fire suppression systems; electrical; and other structural inspections. Also includes inspections of marijuana grow operations after appropriate notification from a police force. NOTE: Initial fire system test report = life of system EXCLUDES: By-Law Enforcement – see P01	Confidential	Building	Electronic and Physical	Permanent
P07	Health and Fire Safety Inspections	Includes Fire Marshall's, Public Health and related health and safety violation and verification inspection reports conducted or performed on private, public and commercial properties. EXCLUDES: Internal Health & Safety Inspections – see H04 Routine building and structural inspections – see P06	Confidential	Fire	Electronic and Physical	Superseded but minimum 2 years
P08	Investigations	Includes records of investigation pertaining to law enforcement, or the origin or cause of traffic accidents, serious occurrences and abuse allegations, ambulance and fire response scrutiny. EXCLUDES: By-law Enforcement – see P01 Harassment & Violence staff investigations – see H15	Confidential	Originating	Electronic and Physical	E+10

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P09	Licences	Includes records regarding licences administered by or required by the municipality, or required by the province, such as licensing for dog kennels, dogs, liquor, cemetery, crematorium, funeral establishment licenses, businesses, lotteries, accessible transportation operation and quarries, etc. E = Expiry of Licence EXCLUDES: Marriage Licences – see L12	Confidential	Originating	Electronic and Physical	E + 2
P10	Building Permits	Includes permits issued to builders, contractors, and residents giving them permission to build or renovate. Also includes permits for construction of cell towers and the structure for wind-powered turbines. EXCLUDES: All other permits – see P11	Confidential	Building	Electronic and Physical	P
P11	Permits - Others	Includes applications and copies of permits issued by other government bodies within the municipality as well as permits issued by the municipality giving permission to hold special events, temporary road closure, drinking water works permits, transport oversize loads, erect signs, park on the street, sign permits etc. E = Expiry of permit (NOTE: For Sign Permits, retention is 2 years after the sign is removed) EXCLUDES: Building Permits – see P10 Encroachment Permits – see D16 Burial Permits – see S09 Road and lane opening/closings – see T09	Restricted	Originating	Electronic and Physical	E+2
P12	Warrants	Includes all warrants issued for By-Law enforcement purposes. E = Execution of warrant. NOTE: Court Services Warrants - 40 years	Confidential	By-law	Electronic and Physical	E+2
P13	Criminal Records	Includes all documentation relating to individuals with a history of criminal activity. E = Occurrence / Investigation closed or disposition of charge EXCLUDES: Staff Police Background Checks – see H16 Investigations – see P08 Prosecutions – see L13	Restricted	Originating	Electronic and Physical	E+5
P14	Animal Control	Includes records regarding the control of household pets, strays, livestock and wildlife and livestock evaluation reports. Also includes records of distrained animals and pound animal records. E = Date animal was past in the pound EXCLUDES: Dog Licenses – see P09	Confidential	By-law	Electronic and Physical	E+2
P15	Community Protection Programs	Includes records on community protection and crime prevention such as Community Policy, Victim Services Neighbourhood Watch and Block Parents. Also includes programs aimed at public education on fire, water and traffic safety and similar programs. Records include correspondence and brochures. E = Superseded EXCLUDES: Video Surveillance Footage - see A18A	Confidential	Originating	Electronic and Physical	E + 2
P16	Emergency Services	Includes records regarding police, land ambulance, fire and rescue services	Confidential	Originating	Electronic and Physical	E+5

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P17	EMS and Fire Significant Incident and Impact Reports	Includes reports and statements documenting significant and noteworthy incidents events that occur when responding to an EMS or Fire, the role of the attending responders in the incident, and the actual or potential impact of these incidents. E = Superseded	Confidential	Fire	Electronic and Physical	E+5
P18	EMS and Fire Response Reports	Includes records relating to emergency services provided such as ambulance paramedical services and patient transport, and fire suppression and emergency call response. Includes ambulance call reports (ACR), emergency response reporting, fire call reports and fire cause identification. E = Superseded EXCLUDES: Investigations – see P08	Confidential	Fire	Electronic and Physical	E+5
P19	EMS and Fire Statistics	Includes records relating to performance plans and the associated statistical reporting of performance, calls and accidents involving emergency medical services, traffic and work-related issues E = Superseded	Public	Fire	Electronic and Physical	E + 2
P20	Prohibitions & Notices	Includes prohibition orders, notices and correspondence related to prohibition under regulations such as Source Drinking Water Protection. May also contain building code applications denied because of prohibition.	Confidential	Legal	Electronic and Physical	15
P21	Facilities Routine Water Use, Monitoring and Testing	Includes records regarding the testing of swimming pool or splash pad water for chlorine and pH levels, water outlet inspections, the number of bathers per day, any rescues or breakdowns of equipment. Also includes routine testing, monitoring and flushing of water systems in recreational camps, child care and long term care facilities. NOTE: Child care facility plumbing flush and water testing = 6 years	Public	Originating	Electronic and Physical	6
R01	Heritage Preservation	Includes records regarding heritage and historical development, including designations and registers of buildings, districts, and cemeteries as well as archaeological digs, archeological and heritage assessments, and heritage conservation district studies and plans. May also include heritage registries. E = End of plan year or removal of designation EXCLUDES: Historical Designation By-Laws - see C01 Natural heritage preservation – see E18	Public	Originating	Electronic and Physical	E+3
R02	Library Services	Includes circulation lists, recommendations for additions to library collections, information searches, inter-library loan requests and more general records regarding the operation of libraries. May include subscription renewals of magazines and receipts from book sales. May also include copy logs.	Public	Originating	Electronic and Physical	5
R03	Museum and Archival Services	MUSEUM AND ARCHIVAL SERVICES Includes registers of holdings, museum programming, activity reports, historical society holdings, archival operations, conservation information and related records. E = Superseded EXCLUDES: Record Centre Operations - see A10.	Public	Clerk's	Electronic and Physical	E + 3
R04	Parks Management	Includes correspondence, descriptions, reports and other records dealing with the management design, set-up, landscaping and maintenance of specific municipal parks. Includes maps and plans. Also includes information dealing with maintenance of playground equipment. EXCLUDES: Building and Property Maintenance – see A20	Public	Community Services	Electronic and Physical	Park Maintenance =5 years Playground Equipment Maintenance= 20 years

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R05	Do Not Use					
R06	Recreational Programming	Includes correspondence, applications, registrations and general information regarding the development and delivery of recreational programs to the community such as youth, sport and fitness, adult education, crafts and other programs. E = Program development & evaluation, attendance fee collection and registrations	Confidential	Community Services	Electronic and Physical	E + 6
S09	Cemetery Interment	Includes cemetery license, burial permits, maps, plot ownership records, deemed cancellations, death certificates and warrants to bury, interment or scattering rights certificates, cremated remains and body disposal registers, and indexes for municipal cemeteries and abandoned cemeteries. Burial Permits = 2 years EXCLUDES: Building and Property Maintenance - see A20 Promotional materials – see M07 Price lists and cemetery operation – see S20	Confidential	Community Services	Electronic and Physical	P
S20	Cemetery Operations	Includes records relating to the business operation of a municipal cemetery including price lists and removed markers records. E = Contract fulfilled, or no longer required EXCLUDES: Burial permits, interment records, etc. - see S09 Promotional materials – see M07	Confidential	Community Services	Electronic and Physical	E+6
T01	Illumination	Includes records and studies regarding the installation and repair of equipment used to illuminate roads such as street lights, pedestrian crossover lights, etc. Also includes records on power consumption. E = Removal of the equipment. NOTE: Specifications are PERMANENT	Confidential	Operations	Electronic and Physical	E + 6
T02	Parking	Includes records and studies regarding municipal parking issues such as handicapped parking, lot and garage operations, fire routes and employee parking. E = Closure of parking lot or space	Confidential	Originating	Electronic and Physical	E+6
T03	Public Transit Operations	Includes records regarding public transit systems. Includes schedules, routes, maps and similar information. Also includes project records, route administration and planning, fare policies, intergovernmental transit co-ordination. E = Closure of route / shelter / stop EXCLUDES: Driver scheduling – H01	Confidential	Community Services	Electronic and Physical	E + 3
T04	Road Construction	Includes records and studies regarding construction projects on roads. Includes the construction of new roads and major improvements to existing roads, such as resurfacing, widening, etc. E = project finished. Specifications are PERMANENT EXCLUDES: Design and Planning - see T05 Routine maintenance and minor improvements to road systems - see Road Maintenance – see T06 Drawings - see A27 Specifications are PERMANENT	Confidential	Operations	Electronic and Physical	E + 15
T05	Road Design and Planning	Includes estimates, studies and other records regarding the design and planning of specific road construction projects. Also includes design of curbs and sidewalks, cycle ways, footpaths, walkways, entrance permits etc. E = project finished. Specifications are PERMANENT EXCLUDES: Specifications are PERMANENT, including for entrance permits	Confidential	Operations	Electronic and Physical	E + 15

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T06	Road Maintenance and Salt Usage	Includes records and studies regarding the inspection and maintenance of roads. Minor repair maintenance includes the installation of culverts, minor repairs to the road surfaces, curbs and side-walks, cycle-ways, footpaths, walkways, etc. Routine maintenance includes grading, ploughing and sanding of roads, and snow removal and cleaning. Also includes Salt Management Plan and revisions, yearly review, reports, other records, studies, and information regarding salt usage and contamination from salt used on roads. Includes training program materials and records of training for all personnel when managing or performing winter maintenance activities involving the use of road salts. E = Project finished. Specifications are PERMANENT EXCLUDES: Non salt usage training records - see H03	Confidential	Operations	Electronic and Physical	E + 15
T07	Signs and Signals	Includes records and studies regarding the manufacture, installation, servicing and maintenance of signs and signals. E = Removal of sign/signal EXCLUDES: Visual Identity Program - see M09 Sign Permits – see P11	Confidential	Operations	Electronic and Physical	E + 1
T08	Traffic	Includes records and studies regarding the flow of traffic on roads. Includes intersection drawings, pedestrian crossovers, crossing guards, traffic counts, accident statistics and related records. Also includes records regarding impacts of temporary road closures for special events. E = Project finished EXCLUDES: Permits for temporary closure – see P11	Public	Operations	Electronic and Physical	E + 15
T09	Roads and Lanes Openings / Closures	Includes records on roads and lanes closed on a permanent or regular basis. Records include reports, appraisals, correspondence and district court applications. As well as records related to requests to open road and street allowances. E = Project finished EXCLUDES: Temporary road closures - see T08 Land Sales - see L07 Road Closing By-Laws - see C01	Confidential	Originating	Electronic and Physical	E+15
T10	Field Survey/Road Survey Books	Includes engineering field survey notes as well as books. E = Project finished	Confidential	Operations	Electronic and Physical	E + 1
T11	Bridges	Includes estimates, studies and other records regarding projects specifically for bridge construction, also includes bridge repairs and maintenance. E = Project finished. Specifications are PERMANENT EXCLUDES: Specifications are PERMANENT	Public	Operations	Electronic and Physical	E + 15
V01	Fleet Management	Includes records of summary fleet information and fleet records for each vehicle (including attached devices such as Fire-Fighting Chassis Mounted Aerial Devices) leased or owned, operated and maintained by the municipality. This includes plate permits, CVOR certificates, operating manuals, routine/daily inspections, vehicle history files, ignition interlock device installation, and vehicle maintenance, registration and disposal. E = Termination of Lease EXCLUDES: Insurance Policies - see L06 Accident Claims - see L02, L03 Leases/Contracts - see L14	Public	Finance	Electronic and Physical	E + 2

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V02	Mobile Equipment	Includes records and operating manuals regarding mobile (motorized) equipment used in conjunction with vehicles. Also includes routine inspections, maintenance and history files on equipment such as generators, pumps, snow-blowers, sanders, etc. E = Disposal of equipment	Public	Originating	Electronic and Physical	E + 2
V03	Transportable Equipment	Includes operating manuals and records regarding transportable equipment used by the municipality. Also includes routine inspections, maintenance and history files on equipment such as lawnmowers, hoses, weed-eaters, drills, and rescue equipment. E = Disposal of Equipment	Public	Originating	Electronic and Physical	E + 2
V04	Protective Equipment	Includes operating manuals and records regarding protective equipment used by the municipality. Also includes routine inspections, maintenance and history files on equipment such as portable fire extinguishers, rescue equipment, breathing apparatus, breathing tanks, down alarms, etc. E = Disposal of equipment EXCLUDES: Uniforms and Clothing - see A14	Public	Originating	Electronic and Physical	E + 2
V05	Ancillary Equipment	Includes records regarding fixed equipment, which is non-vehicle and non-office in nature. Includes equipment such as work or suspended platforms, lifting devices not attached to a structure, appliances such as autoclaves and dishwashers, garbage compactors, industrial shredders etc. Includes correspondence, equipment user and procedural manuals, warranty, routine inspections, maintenance, licences and history records. Includes setup tests and manuals. E = Disposal of equipment. Setup tests = superseded EXCLUDES: Gasoline storage tanks – see E24 Mechanical & operational systems integral to building structure – see A26 Private/small water systems – see E22	Public	Originating	Electronic and Physical	E + 2