

**R.M. of Browning No. 34**

**Record Retention**

**Policy No. 200-10**

**February 7, 2019**

Subject:	Record Retention
Type:	Administration
Authority:	Approved by Council: February 7, 2019

**Record Retention**

1. The Administrator is responsible to maintain and destroy all documents of the R.M. of Browning No. 34 in accordance with the following schedule.

<b>Records</b>	<b>Retention Period</b>	<b>Disposal Recommendation</b>
<b>1. Accounting and Finance</b>		
<b>1.1 Accounts Payable</b> (includes billing, payments, overdue accounts, invoices, receipts, payment vouchers, receipt duplicates, related correspondence, etc.)	7 years	Dispose
<b>1.2 Accounts Receivable</b> (includes receipts records, write offs, invoices, vouchers, related correspondence, etc.)	7 years	Dispose
<b>1.3 Annual Financial Statements</b>	Permanent	Permanent

<b>1.4 Audits and Compliance Reviews</b> (auditor recommendations, reports, etc.)	7 years	Dispose
<b>1.5 Bank Accounts</b> (includes records related to termination and establishment of bank accounts, deposit slips, cancelled cheques, passbooks, bank statements, reconciliations, deposit books, cheques stubs/duplicates, etc.)	7 years	Dispose
<b>1.6 Budget</b>	Permanent	Permanent
<b>1.7 Budget Related Reports</b>	7 years	Dispose
<b>1.8 Cash Payments and Receipts</b> (includes cash payments books, printouts, cash reports and summaries, register tapes, etc.)	7 years	Dispose
<b>1.9 Debentures/Loans</b> (includes register/coupons, etc.)	7 years	Dispose
<b>1.10 Federal/Provincial Remittance</b>	7 years	Dispose
<b>1.11 Grants</b> (includes applications and supporting documentation)	7 years after completion of project/application rejection	Contact Provincial Archives before disposal
<b>1.12 Investment Records</b>	7 years after maturity	Dispose
<b>1.13 Ledgers/Journals</b> (Includes general ledgers, subsidiary ledgers, ledger cards, reports, journals, etc.)	7 years	Dispose
<b>1.14 Local Improvement Roll</b>	7 years after completion of project	Dispose
<b>1.15 Monthly Financial Statements</b>	7 years	Dispose
<b>1.16 Requisition/Purchase Orders</b>	7 years	Dispose

<b>1.17 Tax Roll/Assessment Roll</b> (i.e. hard copy of year-end printout)	Permanent	Permanent
<b>1.18 Utility Documents</b> (includes water and sewer cards and ledgers, utilities tax roll, etc.)	7 years	Dispose
<b>2. Administration</b>		
<b>2.1 Agreements/Contracts and Supporting Documentation</b> (pertaining to land, buildings, properties, structures, etc.)	10 years after disposition of building, property or structure	Contact Provincial Archives before disposal
<b>2.2 Agreements/Contracts and Supporting Documentation</b> (not related to land, buildings, properties, etc.)	7 years after termination of agreement/contract	Contact Provincial Archives before disposal
<b>2.3 Appeals</b> (under <i>The Planning and Development Act, 1983</i> )	7 years after final decision	Contact Provincial Archives before disposal
<b>2.4 Celebrations and Events</b>	3 years after concluded	Contact the Provincial Archives before disposal
<b>2.5 Cemetery Records</b>	Permanent	Permanent
<b>2.6 Change of Ownership Documents</b>	7 years	Dispose
<b>2.7 First Nations Consultations</b>	Permanent	Permanent
<b>2.8 Inquiries</b> (under <i>Local Authority Freedom of Information and Protection of Privacy Act</i> )	7 years	Dispose
<b>2.9 Insurance Policies - Liability</b> (may be required if there is a liability claim in the future)	Permanent	Permanent
<b>2.10 Insurance Policies - Property</b> (includes insurance claims)	7 years after termination/cancellation of Policy	Dispose
<b>2.11 Photographs</b>	When Obsolete	Contact the Provincial Archives before disposal

<b>2.12 Public Notice Documentation</b>	2 years after event	Dispose
<b>2.13 Records Disposal Documentation</b>	Permanent	Permanent
<b>2.14 Tax Assessment Appeals</b>	7 years after final decision	Dispose
<b>2.15 Tax Assessment Records</b> (assessor's valuation records, reassessment sheets, etc.)	3 years after superseded by new assessment or obsolete	Dispose
<b>2.16 Tax Certificates</b>	7 years	Dispose
<b>2.17 Tax Notices</b>	7 years	Dispose
<b>2.18 Tax and Assessment Undelivered Notices</b> (where a notice undelivered or returned due to an unknown address the notice shall be retained)	7 years	Dispose
<b>2.19 Tax Enforcement Records</b> (includes tax lien withdrawals, etc.)	7 years after tax title property is disposed of	Dispose
<b>2.20 Other Enforcement Records</b> (includes weed control & pest control records)	7 years after settlement	Dispose
<b>2.21 Water Analysis and Reports</b> (may be required if there is a liability claim in the future)	25 years	Contact the Provincial Archives before disposal
<b>3. Election</b>		
<b>3.1 Ballots</b>	3 months	Dispose
<b>3.2 Disclosure of Holdings</b> (includes public disclosure statements)	Term of Office	Dispose
<b>3.3 Declaration of Agent/Friend</b>	3 months	Dispose
<b>3.4 Declaration of Polls</b>	3 months	Dispose
<b>3.5 Deputy Returning Officer Statement of Results</b>	Permanent	Permanent
<b>3.6 Nominations and Receipts</b>	Term of Office	Dispose

<b>3.7 Oaths of Office</b>	Term of Office	Dispose
<b>3.8 Returning Officer's Summary of Results</b>	Permanent	Permanent
<b>3.9 Poll Books</b>	3 months	Dispose
<b>3.10 Voter's Lists</b>	Contact the Provincial Archives	Contact the Provincial Archives before disposal
<b>3.11 Voter's Registration Forms</b>	3 months	Dispose
<b>3.12 Ballot Box Contents</b> (includes ballots, registration forms, etc.)	3 months	Dispose
<b>3.13 List of Assessed Owners</b>	Until Replaced	Dispose
<b>4. Employee - Employer</b>		
<b>4.1 Employee Records</b> (includes time cards, pay records, etc.)	10 years after termination of employment	Dispose
<b>4.2 Income Tax</b> (T4s, TD1s, etc.)	7 years	Dispose
<b>5. Legal</b>		
<b>5.1 Minister's Orders</b>	Permanent	Permanent
<b>5.2 Claims</b> (includes notices of claim, statements of claim, etc.)	10 years after settlement	Contact the Provincial Archives before disposal
<b>5.3 Petitions</b>	7 years	Contact the Provincial Archives before disposal
<b>5.4 Writs</b>	10 years after expiration or completion	Dispose
<b>6. Licenses and Permits Issued by the R.M. of Browning No. 34</b>		
<b>6.1 Building Permits</b> (includes supporting documentation)	10 years after rejection of permit or life of building/structure	Contact the Provincial Archives before disposal
<b>6.2 Development Permits</b> (includes supporting documentation)	25 years after superseded	Contact the Provincial Archives before disposal
<b>6.3 Development Permits - Denied</b>	10 years	Contact the Provincial Archives before disposal
<b>6.4 Development Permits - Register</b>	Permanent	Permanent
<b>6.5 Other Permits</b>	3 years after expiration	Dispose

<b>6.6 Licenses</b> (includes supporting documentation)	7 years after termination or rejection of license	Dispose
<b>7. Licenses and Permits Issued to the R.M. of Browning No. 34</b>		
<b>7.1 Licenses and Permits</b> (related to land, buildings, structures, properties)	10 years after the rejection of permit/license or lifetime of structure, building, or property	Contact the Provincial Archives before disposal
<b>7.2 Licenses and Permits</b> (not related to land, buildings, structures and development projects)	7 years after termination or rejection of license or permit	Dispose
<b>8. Maps, Plans and Surveys</b>		
<b>8.1 Architect's Drawings</b> (buildings, park sites, structures, etc.)	10 years after the lifetime of facility/structure	Contact the Provincial Archives before disposal
<b>8.2 Municipal Maps and Plans</b>	Permanent	Permanent
<b>8.3 Road Surveys</b>	7 years	Contact the Provincial Archives before disposal
<b>8.4 Land Surveys Certificates/Surveyor's Reports</b>	7 years	Dispose
<b>9. Minutes and Bylaws</b>		
<b>9.1 Council Minutes</b> (includes original bylaws, active and repealed)	Permanent	Permanent
<b>9.2 Repealed Bylaws</b> (includes certified copies that may be retained in Repealed Bylaw Registers)	7 years	Dispose
<b>9.3 Bylaw Registers</b>	Permanent	Permanent
<b>10. Reports and Statistics</b>		
<b>10.1 Reports of Boards and Committees established by Council</b> (not forming part of Council minutes)	7 years	Contact the Provincial Archives before disposal
<b>10.2 Vital Statistics</b>	7 years	Dispose
<b>11. Roads and Streets</b>		
<b>11.1 Road Maintenance Records</b> (includes reports)	25 years	Contact the Provincial Archives before disposal

