

# Toronto District School Board

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Operational Procedure PR677

Title: **RECORDED INFORMATION MANAGEMENT**

Adopted: September 1, 2006, **September 2007**

Revised:

Reviewed: December 2012

Authorization: Executive Council

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## 1.0 OBJECTIVE

To provide information concerning the Board's recorded information management system including the records classification system and the records retention schedule

## 2.0 RESPONSIBILITY

Manager, Board Services

## 3.0 DEFINITIONS

In November 1998, a Records Classification System for the Toronto District School Board was approved.

Under the Municipal Freedom of Information and Protection of Privacy Act, the Board is required to ensure access to information under its control or custody, within the provisions of the legislation. Solid recorded information management practices, such as the use of accurate and consistent coding, filing and retrieval practices, assist the Board to meet its obligations to provide access to Information.

## 4.0 PROCEDURES

- 4.1 The Board's Recorded Information Management system is comprised of two parts: the Records Classification System and the Records Retention Schedule.
- 4.2 This system applies to both paper and electronic records and was distributed to all administrative staff in schools and education centres. As many changes have taken place within departments over the last few years this information is being reissued in this procedure format.
- 4.3 In order to assist staff with this process the procedure provides the following:
  - (a) Card outlining whole classification system (677A)
  - (b) Card outlining alphabetical index to the classification system (677B)

- (c) Information on how to a Windows folder called TDSB which includes sub-folders for every classification code (677J)

All records, including documents, **must be saved and/or filed** in accordance with the correct Records Classification Code, and **have the code noted** on the record.

#### 4.4 Supporting Documents (published as forms)

The documents that follow comprise the actual procedure for the Records Classification System. They are accessed as forms on the Policy and Procedures website and may be printed and placed in a binder or referred to on-line, according to individual preference.

<u>Title</u>	<u>Document (Form)</u>	<u>Instructions</u>
DESKTOP REFERENCES		
Records Management Classification System: Quick Reference	<b>677A</b>	It is suggested that this be printed on <b>PINK</b> card stock and used as a handy <b>desktop reference</b> . It is three pages in length provides a quick reference of the classification codes.
Records Management Classification System: Subject Guide	<b>677B</b>	It is suggested that this be printed on <b>GREY</b> card stock and used as a handy <b>desktop reference</b> . It is 11 pages in length and provides a quick cross-reference of how common types of records should be coded.
USE ON-LINE OR PLACE IN BINDER (print on white paper)		
Cover page	<b>677C</b>	1 page in length
Table of Contents	<b>677D</b>	1 page in length
Recorded Information Management Model	<b>677E</b>	9 pages in length This document provides an overview of the Recorded Information Management model, from exactly what constitutes a “record” to examples of record coding.
Frequently Asked Questions	<b>677F</b>	2 pages in length. This document provides a summary of the records that would be includ-

<u>Title</u>	<u>Document (Form)</u>	<u>Instructions</u>
		ed in the eleven primary headings. (The primary headings are the alphabetical designation of the code.)
Summary or Primary Headings	<b>677G</b>	3 pages in length. This document provides a summary of the records that would be included in the eleven primary headings. (The primary headings are the alphabetical designation of the code.)
Scope Notes	<b>677H</b>	60 pages in length. This document is extremely useful in helping you to determine how a file should be coded. For each classification code, examples are given of what should be included and what should not be included.
<b>LABELS FOR HARDCOPY FILES</b>		
File Labels	<b>677I</b>	9 label sheets are required; This is a file that will print a set of file labels in the 2 x 15 format (30 labels per page). Nine label sheets are required.
<b>OTHER INFORMATION</b>		
Instructions for Installing a MSWindows TDSB Folder on Your Computer	<b>677J</b>	5 pages in length. This document provided instructions for downloading a Windows folder called TDSB which includes sub-folders for every classification code
Records Management Retention Guidelines	<b>677K (alpha)</b> <b>677L (by classification code)</b>	25 pages each in length. These documents serve as a base to ensure that records are appropriately retained according to a legal and/or ministry retention schedule. Executive Assistants are responsible for off-site storage of departmental records. (This function is not related to the Board's Museum and Archives.)
Yearly Memo From Administrator	<b>677M</b>	7 pages in length. This memo is distributed at the beginning of every school year providing general information and updates re the Recorded Information Management system.

Contact for additional information:  
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Manager, Board Services

## **5.0 REFERENCE DOCUMENTS**

Operational Procedure

PR676: Freedom of Information and Protection of Privacy