

**Schedule A - Records Retention Schedule - Corporation of the Town of Orangeville**

Code	Secondary Heading	Responsible Department	Vital Y/N	Personal / General	Active	Inactive	Total Retention	Supplementary Information
<b>Administration</b>								
A01	Associations and Organizations	Originating	N	G	1	N/A	1	Excludes membership fees: see F01
A02	Staff Committees and Meetings	Originating	Y	G	2	2	SAS	
A03	Computer Systems and Information Architecture	IT	Y	G	S	6	S + 6	
A04	Conferences and Seminars	Originating	N	G	1		SAS	Archival review if sponsored by the Municipality
A05	Consultants	Originating	N	P	2		SAS	
A06	Inventory Control	Originating	N	G	3	3	6	
A07	Office Equipment and Furniture/Recording Equipment	Originating	N	G	S		S	Disposal of item
A08	Office Services	Originating	N	G	1		1	
A09	Policies and Procedures	Originating	N	G	S	15	SAS	
A10	Records Management	Clerk's	N	G	S	1	S + 1	
A11	Records Disposition	Clerk's	Y	P	P		P	
A12	Telecommunications Systems	Originating	N	G	S		S	
A13	Travel and Accommodation	Originating	N	G	1		1	
A14	Uniforms and Clothing	Originating	N	G	S		SAS	
A15	Vendors and Suppliers	Originating	N	G	2		2	
A17	Information Access and Privacy	Clerk's	Y	P	2	3	5	
A17-A	Freedom of Information Requests	Clerk's	Y	P	2		2	
A18	Security	Clerk's	N	G	2	3	5	CCTV recordings are retained for 7 days, unless requested by law enforcement, at which time the requested recording will be retained and classified under P08.
A18-A	Visitor's Sign in Logs	Originating	N	G	2	3	5	
A19	Facilities Construction and Renovations	Originating	N	G	E	1	E + 2	E = Completion with no outstanding issues
A20	Building and Property Maintenance	Originating	N	G	2	3	5	Setup tests and manuals: E = equipment removed + 1 year
A21	Facility Bookings	Originating	N	P	1		1	
A22	Accessibility of Services	Building	N	G	2	3	5	
A23	Information Systems Production Activity and Control	IT	N	G	2		2	for backup data see I04
A24	Access Control and Passwords	IT	Y	P	2		S	
A25	Performance Management / Quality Assurance	CAO	N	G	3	3	6	
A26	Building Structure Systems	Building	N	G	S		S	superceded or life of system / asset
<b>Council, Boards and By-laws</b>								
C01	By-laws	Clerk's	Y	G	4	P	P	
C02	By-laws - Other Municipalities	Originating	N	G	S		S	
C03	Council Agendas	Clerk's	N	G	S	5	S + 5	
C04	Council Minutes	Clerk's	Y	G	P		P	
C05	Council Committee Agendas	Clerk's	N	G	E		E + 4	E = End of council term
C06	Council Committee Minutes	Clerk's	Y	G	3	P	P	Sub-committee agendas = 5
C07	Elections	Clerk's	Y	P	E + 4		E + 4	E = day action took effect or voting day Ballot = 120 days after voting or resolution of recount
C08	Goals and Objectives	Originating	N	G	10		SAS	
C09	Motions and Resolutions/Declarations of Interest	Clerk's	y	G	S		P	Copy = 1 year
C10	Motions and Resolutions - Other Municipalities	Clerk's	N	G	S		S	
C11	Reports to Council	Clerk's	Y	G	2	P	P	
C12	Appointments to Boards and Committees	Clerk's	N	G	1	P	P	

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C13	Accountability, Transparency and Governance	Clerk's	Y	G	2		2	
<b>Development and Planning</b>								
D01	Demographic Studies	Planning	N	G	5	5	10	
D02	Economic Development	Economic Development	N	G	5	5	10	
D03	Environment Planning	Planning	N	G	E	15	SAS	
D04	Residential Development	Planning	N	G	5	5	SAS	
D05	Natural Resources	Planning	N	G	3	2	SAS	
D06	Tourism Development	Economic Development	N	G	5	5	10	
D07	Condominium Plans	Planning	Y	G	5	P	P	
D08	Official Plans	Clerk's					P	
D09	Official Plan Amendment Applications	Planning	Y	G	E + 2	3	E + 5	
D10	Severances	Clerk's	Y	G	Land titles registration + 6		Land titles registration + 6	
D11	Site Plan Control	Planning	Y	G	5	P	P	Application 2 years after decision
D12	Subdivision Plans	Planning	Y	G	5	P	P	Application 2 years after decision
D13	Variances - Decisions	Clerk's	Y	G	E + 2	P	P	E = final decision
D13-A	Variances - Applications and Notices	Clerk's	Y	G	E + 2	3	5	
D14	Zoning	Planning	Y	G	E + 2		E + 2	E = final decision
D15	Easements	Planning	Y	G	E + 2	3	SAS	E = expiry of right
D16	Encroachments	Planning	Y	G	E + 1	5	SAS	E = expiry of right
D17	Annexations and Amalgamation	Clerk's	Y	G	5	P	P	
D18	Community Improvement Projects	Planning/Economic Development	Y	G	E + 2	3	SAS	E = Project Completion
D19	Municipal Addressing	Planning	N	G	S	10	S + 10	
D20	Reference Plans	Planning	Y	G	S	P	P	
D21	Industrial/Commercial and Institutional Development	Economic Development	N	G	5	5	10	
D22	Digital Mapping	Planning	Y	P	S		S	Excludes actual data residing on these systems
D24	Background Reports for Official Plan	Planning	Y	G	E + 2	3	E + 5	E = final decision
D25	Deeming Process	Planning					E + 2	E = final decision
D26	Development Charges Study	Planning			5	5	SAS	
<b>Environmental Services</b>								
E01	Sanitary Sewers - Design & Construction	T&D	Y	G	5	P	P	Includes specifications
E01-A	Sanitary Sewers - Maintenance	Public Works	Y	G	E + 2		E + 2	
E02	Storm Sewers - Design & Construction	T&D	Y	G	5	P	P	Includes specifications
E02-A	Storm Sewers - Maintenance	Public Works	Y	G	E + 2		E + 2	
E03	Treatment Plants - Design & Construction	Capital Works	Y	G	5	P	P	Includes specifications and plans
E03-A	Treatment Plants - Maintenance	Public Works (Wastewater)	Y	G	2	3	E + 5	E = report made or when plans cease to apply
E04	Tree Maintenance	T&D / Public Works	Y	G	2	3	5	
E05	Air Quality Monitoring	Public Works	Y	G	E + 5		SAS	E = date of offence or day of evidence of offence first came to attention of person appointed under s. 5
E06	Utilities	T&D / Public Works	N	G	5		SAS	
E07	Waste Management - Design	T&D / Public Works / Capital Works	Y	G	2	8	10	Except post landfill site documentation of closure = E + 25
E07-A	Waste Management - Operations/Maintenance	Public Works	Y	G	2	3	5	

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E08	Water Works	Public Works	Y	G	5	10	15	Specifications = P
E09	Drains	Public Works	Y	G	5		P	
E10	Pits and Quarries	Public Works	Y	G	2	3	5	Specifications = life of pit or quarry
E11	Nutrient Management	Public Works	N	G	E + 2		E + 2	E = expiry of plan
E12	Private Sewage Disposal Systems	T&D / Public Works	Y	G	3	4	SAS	Specifications = life of system
E13	Water Monitoring	Public Works	Y	G	5	10	E + 15	E = created, approved or plan no longer in force
E14	Water Sampling	Public Works	Y	G	5	10	E + 15	E = created, approved or plan no longer in force; Child Care Facility plumbing flush and water testing = 6
E15	Chemical Water Sampling	Public Works	Y	G	5	10	E + 15	E = created, approved or plan no longer in force
E16	Backflow Prevention and Cross Connection Control	Public Works	Y	G	5	10	15	
E17	Energy Management	T&D	Y	G	E + 3	4	E + 7	E = end of reporting period
E18	Natural Heritage	T&D	Y	G	E + 1	2	E + 3	E = end of plan or designated year
E19	Renewable Energy	T&D	Y	G	E + 5	10	15	E = created, approved or facility no longer in force
E20	Source Water Protection	T&D	Y	G	E + 5	10	E + 15	E = created, approved or plan no longer in force
E21	MOE Environmental Compliance Approvals	Public Works	Y	G	E + 3		E + 3	E = cease to apply
E22	Private / Small Water Systems	T&D / Public Works	Y	G	E + 5	10	E + 15	Maintenance = as long as equipment in use
E23	Land Quality Monitoring	T&D	Y	G	3	4	7	
E24	Gasoline Storage and Dispensing	Public Works	Y	G	3	4	7	tank install, inspection = system removed + 5
<b>Finance and Accounting</b>								
F01	Accounts Payable	Treasury	N	G	E + 1	6	E + 7	E = close of fiscal tax year end
F02	Accounts Receivable	Treasury	N	G	E + 1	6	E + 7	E = close of fiscal tax year end
F03	Audits	Treasury	Y	G	1	5	6	
F04	Banking	Treasury	N	G	1	5	E + 7	E = close of fiscal tax year end
F05	Budgets and Estimates	Treasury	Y	G	1	5	SAS	
F06	Assets	Treasury	Y	G	E + 5	5	SAS	E = disposal of asset
F07	Cheques	Treasury	N	G	3	3	6	
F08	Debentures and Bonds	Treasury	Y	P	E + 3	3	E + 6	E = debentures surrendered for exchange / cancellation + 6
F09	Employee and Council Expenses	Treasury	N	P	E + 1	6	E + 7	
F10	Financial Statements	Treasury	Y	G	2	P	P	
F11	Grants and Loans	Treasury	N	G	E + 1	6	E + 7	E = repayment of loan
F12	Investments	Treasury	Y	G	E + 1	5	E + 6	E = closure of account
F13	Journal Vouchers	Treasury	N	G	E + 1	6	E + 7	E = close of fiscal tax year end
F14	Subsidiary Ledgers, Registers and Journals	Treasury	Y	P	E + 1	6	SAS	E = close of fiscal tax year end
F15	General Ledgers and Journals	Treasury	Y	G	E + 1	P	P	
F16	Payroll	Treasury	Y	P	3	4	7	E = close of fiscal tax year end
F17	Purchase Orders and Requisitions	Treasury	Y	G	E + 1	6	E + 7	
F18	Quotations and Tenders	Treasury	Y	G	3	4	SAS	unsuccessful bids retain for 2 years from contract award. Excludes: Agreements - see L04 Agreement and contract file contains successful bid, original tender and attachments."
F19	Receipts	Treasury	Y	P	3	4	7	
F20	Reserve Funds	Treasury	Y	G	3	3	6	
F21	Revenues	Treasury	Y	G	3	4	7	Mortgage related if no disability = 10
F22	Tax Rolls and Records	Treasury	Y	P	S	P	P	
F23	Write-Offs	Treasury	N	G	3	3	6	Court services write-offs = 37 years

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F24	Trust Funds	Originating	Y	G	E + 3	4	E + 7	E = Fiscal year or last day of residence
F25	Security Deposits	Treasury	Y	G	E	6	E + 6	E = closure of account
F26	Working Papers	Treasury	N	G	E + 1		E + 1	E = completion of audit
<b>Human Resources</b>								
H01	Attendance and Scheduling	HR	N	G	2		5	
H02	Benefits	HR	N	P	S		S	
H03	Employee Records	HR	Y	P	E + 1	4	E + 5	firefighter term + 25
H03-A	Terminated Employees	HR	Y	P	E + 1	9	E + 10	Includes only: Letter of termination, performance reviews, Record of Employment
H03-B	Employees - Students and Volunteers	HR	Y	P	E + 1	2	E + 3	E = Date the employee ceased to be employed by the town.
H03-C	Members of Council and Committees Records	HR	Y	P	E + 1	2	E + 3	E = End of term
H04	Health and Safety	HR	Y	G	2	1	3	Accident reports for construction projects retained with project 1 year after project completion
H05	Human Resources Planning	HR	Y	G	1		Day last used + 1 year	human rights special program planning = 5
H06	Job Descriptions	HR	N	G	S	5	SAS	AS = May pertain to management and senior management descriptions only.
H07	Labour Relations	HR	Y	G	E	10	SAS	E = expiry of contract period
H08	Organization Design	HR	N	G	S		SAS	
H09	Salary Planning	HR	Y	G	5		5	
H10	Pension Records	HR	Y	G	E + 1	6	E + 7	E = termination of employee
H11	Recruitment	HR	N	P	1		1	
H12	Training and Development	HR	N	P	E + 2		E + 2	E = date when course ceases to be offered
H13	Claims	HR	Y	G	E + 1	4	E + 5	E = resolution of claim; Hazardous exposure claim = longer of 40 years or 20 years after last record made
H14	Grievances	HR	Y	G	E + 5	5	E + 10	E = resolution of claim
H15	Harassment and Violence	HR	Y	G	E + 1	2	E + 3	E = resolution of complaint
H16	Criminal Background Checks	HR	Y	G	E + 2	5	E + 7	E = termination of employee
H17	Employee Medical Records - Hazardous Material	HR	Y	G	E + 2	38	E + 40	Or 20 years after last record of exposure
H18	Employee Medical Records	HR	Y	P	E + 3		E + 3	E = resolution of claim; for employee or council health and safety screening and data collection, see H18-A.
H18-A	Health and Safety Screening	Originating	N	P	60 days		60 days	Includes data collected from the public or staff, as a result of public health crises or pandemics.
H19	Disability Management	HR	Y	G	E + 2	3	E + 5	E = Day issued or earlier as may be specified by commission
H20	Confined Spaces	HR	Y	G	S + 2		SAS	Must retain the 2 most recent records
H21	Employee Recognition	HR			5		5	
H22	Employee Certification	Originating	Y	P	E + 2		E + 2	E = certification expired
<b>Information Technology</b>								
I01	Inactive Employee Email Account	IT	N		E + 1		E + 1	E = Date of termination
I01-A	Inactive Council Email Account	IT	N	G	E + 1		E + 1	E = End of term
I01-B	Video-Conferencing Applications Data	IT	N	G			Every 30 days at 12:00 AM from the date of the transitory record's creation.	Includes: backup files and folders, recycle bin files, videoconferencing folders in OneDrive

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I03	Instant Messaging Applications Data - Incl. corporate telephone text (andriod and IOS)	IT	N	N			Every 30 days at 12:00 AM from the date of the transitory record's creation.	Includes: backup files and folders, recycle bin files, instant messaging folders in OneDrive
I04	Unstructured Data	IT	N	N	E + 1		E + 1	Includes data stored on various applications and programs, such as OneDrive.
I05	Backup Data	IT	Y	P	S + 6	N/A	S + 6	Data housed on servers; formerly under A23
<b>Justice</b>								
J01	Certificates of Offence (Part I)	Clerk's			E + 2		E + 2	E = date of completion
J02	Informations Part III	Clerk's			E + 3	3	E + 6	E = date of completion
J03	Control Lists	Clerk's			2	2	4	
J04	Court Dockets	Clerk's			2	2	4	Statement of defence - not set to trial = 5
J05	Transcripts and Records of Court Proceedings	Clerk's			3	3	SAS	
J06	Enforcements and Suspensions	Clerk's			4	4	8	
J07	Appeals and Transfers	Clerk's			3	4	7	
J08	Statistics	Clerk's			4	4	8	
J09	Disclosure	Clerk's			3	3	6	
J10	Certificates of Offence (Part II)	Clerk's			3	3	6	For paid, unpaid, certifications of conviction. For cancelled tickets see J10-A
J10-A	Certificates of Offence (Part II) - Cancelled Tickets	Clerk's			E + 1	1	E+2	E = Date cancelled
<b>Legal Affairs</b>								
L01	Appeals and Hearings	Clerk's	Y	P	E	P	P	E = resolution of claim and any appeals
L02	Claims against the Municipality	Treasury	Y	P	E	2	E + 2	
L03	Claims by the Municipality	Treasury	Y	P	E	2	E + 2	
L04	Contracts and Agreements	Clerk's	Y	G	E + 2	P	P	If a wet signature is provided, the document must be kept in its original physical format
L05	Insurance Appraisals	Treasury	Y	G	E + 5	10	E + 15	
L06	Insurance Policies	Treasury	Y	G	E + 5	10	E + 15	E = expiry of policy
L07	Land Acquisition and Sale	Clerk's	Y	G	10	10	E + 20	
L08	Opinions and Briefs	Originating	Y	G	S		SAS	
L09	Precedents	Originating	Y	G	S		SAS	
L10	Federal Legislation	Originating	N	G	S		SAS	
L11	Provincial Legislation	Originating	N	G	S		SAS	
L12	Vital Statistics	Clerk's	Y	G	2	P	P	
L13	Prosecutions	Clerk's	Y	P	E + 1	6	E + 7	E = delivery of judgement
<b>Media and Public Relations</b>								
M01	Advertising/Notices	Originating	N	G	1		SAS	
M02	Ceremonies and Events	Originating	N	G	1	4	5	
M03	Charitable Campaigns/Fundraising	Originating	N	G	1		1	
M04	Complaints, Commendations, Thank Yous and Inquiries	Originating	N	G	2	3	SAS	
M05	News Clippings	Originating	N	G	1		SAS	
M06	News Releases	Communications	N	G	1		SAS	

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M07	Publications	Originating	N	G	S		SAS	S + 3 if subject to copyright or trademark. Photo waivers = retain for as long as the publication
M08	Speeches and Presentations	Originating	N	G	3		3	
M09	Visual Identity and Insignia	Clerk's	N	G	S	5	SAS	
M10	Website and Social Media Content	Communications	N	G	S		2	Youtube council content = End of council term
M11	Customer and Client Services	Originating	N	G	5		SAS	
M12	Intellectual Property	Communications					E + 5	E = expiry of copyright, trademark or patent
<b>Protection and Enforcement Services</b>								
P01	By-law Enforcement	By-law	N	G	2	4	SAS	
P02	Daily Occurance Logs	Originating	N	G	2	3	SAS	
P03	Emergency Planning	Originating	Y	G	S		SAS	If Environmental Protection Act applies = S + 5
P04	Hazardous Materials	Originating	N	G	S	5	S + 5	
P05	Incident and Accident Reports	Originating	N	P	2	3	5	
P06	Building Inspections	Building	N	G	2		2	Subdivision building inspections to be kept permanently, see P06-B
P06-A	Structural Inspections	Building	N	G	S + 1		S + 1	
P06-B	Subdivision Inspections	Building	N	G	2	P	P	
P07	Health Inspections	HR	N	G	S		S	Minimum 1 year
P08	Investigations	Originating	Y	P	5	5	SAS	
P09	Licences	Originating	Y	P	E + 2	3	E + 5	
P10	Building Permits	Building	Y	P	2	P	P	
P11	Permits - Other	Originating	Y	G	E + 2	3	E + 5	Heritage Permits = S ; Wall/Ground Sign Permits = P
P12	Warrants	Clerk's	Y	P	E + 2	2	E + 2	Court services search warrants 40 years
P13	Criminal Records	Clerk's	Y	P	E + 5		E + 5	
P14	Animal Control	Clerk's	Y	P	E + 2		SAS	
P15	Community Protection Programs	Originating	N	P	S + 2		S + 2	
P16	Emergency Services	Originating	Y	P	S + 5		S + 5	
P17	EMS Incident and Impact Reports	Fire Services	Y	P	S + 5		S + 5	
P18	EMS Accident Reports	Fire Services	Y	P	S + 5		S + 5	
P19	EMS Statistics	Fire Services	Y	P	S + 2		S + 2	
P20	Protection and Enforcement Services - Prohibitions and Notices	Clerk's	Y	P			15	
P21	Protection and Enforcement Services - Facilities Routine Water Use, Monitoring and Testing	Child Care Facility						pools and rec camps = 1 ; child care facility plumbing flush and water testing = 6
<b>Recreation and Culture</b>								
R01	Heritage Preservation	Clerk's	N	G	E + 3		SAS	E = end of plan year or removal of designation
R02	Library Services	Library	N	G	2	3	5	
R03	Museum and Archival Services	Clerk's	N	P	S	3	SAS	
R04	Parks Management	Parks & Rec	Y	P	2	3	5	Play ground equipment maintenance = 15
R05	Recreational Facilities	Parks & Rec	N/A	N/A	N/A	N/A	N/A	Code no longer in use; records contained to be filed under other classification codes
R06	Recreational Programming	Parks & Rec	N	P	1	2	SAS	Program registration = 1

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<b>Social and Health Care Services</b>								
S01	Children's Day Nursery Services	Parks & Rec	N	G	E + 2	18	S	Review after 3 years
S02	Elderly Assistance	Originating	N	G	2	3	S	Review after 3 years
S09	Cemetery Records	Public Works	Y	P	2	P	P	Review after 3 years
S20	Cemetary Operations	Customer Service	N	G				contract fulfilled or no longer applies + 6
<b>Transportation Services</b>								
T01	Illumination	T&D / Public Works	N	G	E	6	E + 6	E = removal of equipment; Specifications = P
T02	Parking	T&D / Public Works	N	G	E	6	E + 6	E = closure of lot or space
T03	Public Transit	T&D	N	G	E + 2		E + 2	2 year minimum retention
T04	Road Construction	T&D / Capital Works	N	G	E + 1		E + 1	Specifications = P
T05	Road Design and Planning	T&D / Capital Works	N	G	E + 1		E + 1	Specifications = P
T06	Road Maintenance	Public Works	N	G	E + 1		E + 1	Training and Reports = 7 ; Specifications = P, see T04
T07	Signs and Signals	T&D / Public Works	N	G	E + 1		E + 1	
T08	Traffic	T&D / Public Works	N	G	E + 1		E + 1	
T09	Roads and Lanes - Openings and Closures	T&D / Public Works	N	G	E + 1		E + 1	
T10	Field Survey/Road Survey Books	Public Works / Capital Works	N	G	E + 1		E + 1	
T11	Bridges - Design & Construction	T&D / Capital Works	Y	G	E + 1		P	
T11-A	Bridges - Maintenance	Public Works	Y	G	E + 1		E + 1	Specifications = P, see T11
<b>Vehicles and Equipment</b>								
V01	Fleet Management	Originating	Y	P	E + 2		E + 2	E = end of lease; public vehicles trip record = 1; daily inspection logs = 1 after vehicle ceases to be operated
V02	Mobile Equipment	Originating	Y	P	E + 1		E + 1	E = disposal of equipment
V03	Transportable Equipment	Originating	N	G	E + 1		E + 1	E = disposal of equipment
V04	Protective Equipment	Originating	N	G	E + 1		E + 1	E = disposal of equipment
V05	Ancillary Equipment	Originating	N	G	E + 1		E + 1	E = disposal of equipment; set-up tests = S