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Table of Contents

Table of Contents.....	2
Background.....	7
Purpose.....	7
Definitions and Key Terms.....	7
Information Security Classifications.....	9
How to Read a Record Series.....	10
2000 Transitory Information.....	11
005 Transitory Information.....	12
020 Quality Control.....	13
030 Email and Calendar.....	14
2004 Bylaw Services and Enforcement.....	15
005 Bylaw Complaints and Enforcement Administration.....	16
010 Bylaw Complaints and Enforcement.....	17
020 Development Compliance Administration.....	18
030 Development Compliance.....	19
040 Licence and Permit Administration.....	20
042 Business Licences.....	21
044 Personal Agency Licences.....	22
046 Personal Licences.....	23
048 Vehicle for Hire Licences.....	24
050 Pet Licences.....	25
060 Community Standards Permits.....	26
064 Fire Services Permits and Inspections.....	27
068 Parkland Use Permits.....	28
070 Public Places Permits.....	29
2006 Communications and Public Relations.....	30
005 Advertising and Campaigns.....	31
008 City Identity.....	32
010 Communications Administration.....	33
020 Customer Scripts and Messages.....	34
030 Feedback and Inquiries.....	35
040 Marketing and Promotions.....	36
050 Media Relations.....	37
060 Public Consultation and Education.....	38
080 Events.....	39
090 Website Administration.....	41
100 Sponsorships.....	42
2008 Community Programs and Services.....	43
010 Admissions.....	44
020 Animal Care and Enclosures.....	45
030 Awards and Recognition.....	46

040 Cemetery Applications, Ledgers and Permits.....	47
050 Client Services.....	48
055 Client Services Administration.....	49
060 Community and Organizational Development.....	50
070 Memberships and Registrations.....	52
075 Housing Programs.....	53
080 Recreation, Leisure, Community and Culture Programs.....	54
090 Social Programs.....	56
2010 Corporate Lands and Property Management.....	57
005 Corporate Lands and Property Administration.....	58
007 Annexation.....	59
010 Attraction, Recreation and Leisure Centre Operations.....	60
015 Bookings and Rentals.....	62
020 Cemetery Operations.....	63
025 Facility and Grounds Operations.....	65
030 Parks and Land Maintenance.....	66
040 Property Acquisitions.....	67
045 Property Appraisals.....	68
050 Property Development.....	69
055 Property Leases.....	70
060 Property Management.....	71
065 Property Sales.....	72
070 Roadway and Traffic Operations.....	73
080 Staff Parking Reports and Tracking.....	75
2012 Corporate Security Services.....	76
010 Security Administration.....	77
020 Security Incidents.....	78
030 Security Standards.....	79
040 Security Surveillance.....	80
045 Security Surveillance Incidents.....	81
2016 Emergency Services.....	82
010 Emergency Preparedness.....	83
020 Emergency Response Operations.....	85
025 Emergency Response Investigations.....	86
040 Public Safety and Prevention Programs.....	87
2018 Financial Management.....	88
010 Accounting.....	89
012 Accounting Third Party Invoices.....	91
018 Assessment.....	92
020 Budgets.....	93
025 General Ledger.....	94
030 Grants and Other City Contributions.....	95
035 Major Asset Disposition.....	96
040 Operating Grants.....	97
050 Payment Card Industry (PCI) Compliance.....	98

060 Tax Recovery.....	99
065 Investment Management Administration.....	100
070 Investment Management Program.....	102
075 Treasury Management.....	103
2020 Governance.....	104
005 Administrative Policies and Policy Tools.....	105
010 Agency, Board, Committee and Commission Administration.....	106
015 Agency, Board, Committee and Commission Proceedings.....	107
020 Assessment Review Board Administration.....	108
025 Assessment Review Board Hearing Files.....	109
027 Audits.....	110
030 Bylaws, Council Policies and Procedures.....	111
040 Census Administration.....	112
045 Census Results and Reports.....	113
050 Community Standards Licence Appeal Committee.....	114
055 Community Standards Licence Appeal Committee Meeting Files.....	115
060 Corporate Culture and Engagement.....	116
080 Corporate Initiatives.....	117
090 Council and Standing Committee Administration.....	118
095 Council and Standing Committee Meeting Files.....	119
100 Council Gifts and Honoraria.....	120
110 Council Initiatives.....	121
120 Council Relations.....	122
130 Delegation of Authority.....	123
140 Election Administration.....	124
142 Election Ballot Account, Nomination Forms and Materials.....	126
144 Political Participant Registration and Election Financial Reporting.....	128
148 Environmental Management.....	130
150 Intergovernmental and External Relations.....	131
160 Organizational Meetings.....	133
170 Organizational Reports.....	134
180 Organizational Structure.....	135
190 Petitions.....	136
195 Quality Management System.....	137
200 Strategic Planning.....	138
210 Subdivision Development Appeal Board Administration.....	139
215 Subdivision Development Appeal Board Decisions.....	141
2022 Human Resource Management.....	142
010 Benefits, Payroll and Pension Programs.....	143
020 Compensation and Position Management.....	144
030 Collective Agreements and Bargaining.....	145
040 Labour Relations.....	146
050 Council, Committee and External Body Appointments.....	147
060 Disability and Medical Management.....	148
070 Employment Records.....	150

074 Benefits, Payroll and Pension Records.....	152
080 Employment Programs.....	154
085 Benefits, Payroll and Pension Planning.....	156
090 Occupational Health and Safety.....	157
110 Onboarding and Offboarding.....	159
160 Recruitment.....	160
170 Staff Support Administration.....	162
180 Time Reporting.....	163
190 Training.....	164
200 Volunteers.....	166
2024 Information Management.....	167
002 Archives Collection Program.....	168
005 Forms Management.....	169
010 Access and Privacy Administration.....	170
012 Access to Information.....	171
016 Privacy Protection.....	172
018 Information Analytics.....	173
020 Information Management Programs.....	174
040 Information Lifecycle Management.....	175
050 Resource Library.....	176
2026 Information Technology Management.....	177
010 Application and Hardware Administration.....	178
012 Application and Hardware Operations.....	179
020 Enterprise Architecture.....	181
2028 Land Use Management.....	182
010 Land Use Administration.....	183
012 Land Development Coordination and Planning.....	184
020 Land Use Agreements.....	186
021 Engineering and Design Guidelines and Standards.....	187
026 Environmental Reporting.....	188
028 Infrastructure and Land Use Planning.....	189
030 Infrastructure Engineering.....	190
056 Building and Development Permits and Inspections.....	191
058 City Streets Access Permits.....	193
060 Fuel Storage Tank System Permits.....	194
061 Temporary Sign Permits.....	195
063 Mechanical Permits and Inspections.....	196
065 Parking and Traffic Permits.....	197
067 Vending Permits.....	198
075 Zoning Clearance.....	199
084 Heritage Management.....	200
2030 Legal Services.....	201
010 Agreement Register.....	202
020 Public Incident Reporting.....	203
030 Insurance Coverage.....	204

040 Legal Advice and Consultation.....	205
060 Litigation and Prosecution.....	207
2032 Materials Services and Equipment Management.....	209
010 Fleet Management.....	210
015 Fleet Maintenance.....	211
020 Maintenance and Use.....	212
030 Procurement and Contract Management.....	214
040 Routine Purchases.....	216
046 Safety Data Sheets.....	217
050 Surplus.....	218
060 Utility Services.....	219
2034 Project Management.....	220
005 Project Administration.....	221
010 Corporate Projects.....	222
015 Infrastructure Projects.....	223
020 Municipal Projects.....	224
2036 Transit Services.....	225
010 Transit Clients.....	226
020 Transit Fare Administration.....	227
030 Transit Operations.....	228
040 Transit Programs.....	230
050 Transit Routes and Schedules.....	231
2042 Waste Management.....	233
010 Waste Operations.....	234
020 Waste Landfill Management.....	236
030 Waste Programs.....	237
### Record Series Template.....	238
### Record Series Template.....	238

Purpose

The City of Edmonton Classification and Retention Schedule describes how we manage records and information at the City. It is a policy tool that classifies and assigns lifecycle management and information security rules to all corporate records, regardless of medium or format.

The City of Edmonton Classification and Retention Schedule allows the City to meet its operational, legal, technical, fiscal and historical information requirements. A standardized classification and retention schedule facilitates:

- organizing related information into a common structure
- locating, accessing and using information that is current and correct
- maintaining information for legislated time periods
- sharing information with the appropriate users
- reducing duplication and unnecessary storage costs
- minimizing loss of information, knowledge and corporate memory

The City of Edmonton Classification and Retention Schedule provides:

- descriptions of the records created, used and received at the City
- standards for how long the City must retain each record series
- notes on applicable legislation, corporate policies, industry guidelines, exclusions and procedural instructions

Definitions and Key Terms

City of Edmonton Classification and Retention Schedule

a living policy document that categorizes records based on similar use and purpose to facilitate lifecycle management. The schedule provides rules that identify the length of time a record needs to be kept (retention period), what to do with the record when it is no longer needed (disposition method) and supplementary information.

City record

recorded information in any form that is acquired or developed during the course of City business.

disposition

the action that occurs when City records and information reach the end of their life cycles and are no longer required for operational or legislative purposes. The final disposition is indicated in a retention schedule and may include destruction, deletion or transfer to the City Archives or another entity.

function

a record classification based on high-level operational or administrative categories of work (e.g., human resources, financial management).

record series

a record classification for a group of similar or related records that are normally used and filed as a unit and can be evaluated as a unit for determining the records retention period.

retention period

the length of time City records and information are required to be retained, as governed by a retention schedule.

retention trigger

an event or date that starts the retention period (for example, the date of building demolition or the date of project completion), required to determine the timing of final disposition.

A common trigger in the City of Edmonton Classification and Retention Schedule is the current year, which means the retention period starts January 1st of the year following the year the record was finalized.

See the [Corporate Information Management Glossary of Terms](#) for additional definitions.

Information Security Classifications

INFORMATION SECURITY CLASSIFICATIONS

The City of Edmonton Classification and Retention Schedule lists default information security classifications for each record series. A security classification identifies the sensitivity, criticality, value and importance of the information in a record and identifies who can have access, protecting the information from unauthorized disclosure or modification.

Each record series includes many different records that perform a similar work purpose; some records may need a more restrictive security classification than others. In order to manage all record types within a record series securely, the most restrictive classification has been set as the default. Some records within a record series may have a less restrictive security class than the default. Please consult your branch leadership if you have questions.

Information Security Classifications

Level	Effect of Disclosure	Examples include
<i>Public</i>		
Accessible to all employees.	Minimal to no negative business impact to the City.	Information on public websites, announcements, approved news releases, job postings, business contact information.
<i>Internal</i>		
Accessible to any employee who requires it for their work.	Moderately negative business impact on the City and stakeholders.	Business information, planning documents, communications with no proprietary information, draft requests for proposals.
<i>Confidential</i>		
Accessible only to a specific function group or role on an as-needed basis if needed for their work.	Serious damage to the City and its stakeholders, including loss of individual privacy and damage to partnerships, relationships and reputation.	Information about time and labour, succession planning, intellectual capital, unreleased financial records, personally identifying data and information.
<i>Restricted</i>		
Accessible only to named individual(s) or specific positions on an as-needed basis for their work, subject to administrative controls.	Extreme damage to the City and its stakeholders, including loss of integrity, image or effective service delivery, loss of life, risks to the public safety, significant damage to property and major economic impact.	Executive Leadership Team deliberations and supporting documents, building plans, City Council in-camera reports, information subject to legal privilege, trade secrets, criminal records, security investigations.

How to Read a Record Series

Record Series Number and Title

A brief description of the record series and the associated business functions.

Includes but not limited to:

- A list of applicable document and data examples (for example, timesheets, customer relationship ticket, feedback forms)

Excludes:

- References for other record series that are closely related in purpose.

Rules

Retention trigger: An event or point in time that changes records from active to semi-active or inactive.

Retention period: The time period records must be kept before disposition can occur.

Based on: Any legislation, professional best practice, industry standards, corporate policies or other guidelines that apply to the record series and its retention requirements.

Disposition: The final outcome of destruction (delete or destroy), permanent or archive.

Systems: The records management system(s) used - this may be a physical record system or digital application(s) that store the records.

Security Class: The default security classification for sharing and restricting information that falls within the record series. Some records within a record series may have a less restrictive security class. Please consult your branch leadership if you have questions.

Notes

- Supplemental information about records.

2000 Transitory Information

This function relates to City information that is needed for a limited time to complete a routine action or prepare a corporate record but is not required to meet statutory obligations or sustain administrative or operational functions.



005 Transitory Information

City information that is needed for a limited time to complete a routine action or prepare a corporate record but is not required to meet statutory obligations or to sustain administrative or operational functions. Transitory information possesses an immediate value and should be routinely deleted or destroyed.

Includes but not limited to:

- Blank, obsolete and unused forms and templates
- Copies that are no longer useful or do not provide value
- Drafts and earlier versions of documents that have been finalized
- Expired payment information
- External advertising materials
- External brochures, company profiles, sales letters, menus, catalogues and price lists
- External or obsolete conference or training materials
- External publications, magazines, books, journals, newspapers and periodicals
- High volume raw data
- Instant messages or chats
- Obsolete notebooks, notepads and calendars
- Outdated letterhead and envelopes
- Unused transit fare products (for example, monthly passes, tickets, youth passes, senior passes)
- Working materials such as notes, calculations and research

Excludes:

- Non-transitory City records, which are records that provide evidence of business activities, transactions or approvals.

Rules

Retention trigger: No longer required

Retention period: 0 years

Based on:

Disposition: Destruction

Systems: Google Workspace Applications

Security Class: Restricted

Notes

- Refer to the [Transitory Record Decision Tree](#) for assistance in identifying transitory and non-transitory records.
- Transitory information is not exempt from review if it relates to a request submitted under the [Access to Information Act](#), ediscovery or legal hold.

020 Quality Control

Information related to quality assurance, quality control or audit purposes that has no further value after the quality check or audit. This includes system backups and physical records replaced by a digital version deemed the authoritative source.

Includes but not limited to:

- Backups
- Customer service phone recordings
- Digitized paper records
- GPS and sensor data
- Gemini input and prompts

Excludes:

- Paper copies of records that must be maintained in paper format, according to the [Electronic Transactions Act](#).

Rules - 001 Digitized Records, GPS Data, Recordings, Gemini Input and Long-term Backups

Retention trigger: Creation data

Retention period: 90 days

Based on: [Digitization of Physical City Records Administrative Guideline](#)
CoE Backup Policy_February 2025

Disposition: Destruction

Systems: CoE Data Centre (long-term backup)

Security Class: Restricted

Rules - 002 Short-term Backups

Retention trigger: Backup date

Retention period: 7 days (local), 14 days (secondary)

Based on: CoE Backup Policy_February 2025

Disposition: Destruction

Systems: CoE Data Centre

Security Class: Restricted

Notes

- Official digitized or scanned versions must be retained according to the applicable record series.

030 Email and Calendar

Information related to the disposition of emails that have a) not been routinely deleted by staff as a transitory record or b) filed in the appropriate location as a non-transitory record.

Includes but not limited to:

- Calendar invitations
- Email messages including attachments (inbox, labelled, archived and sent)
- Meetings and events
- Documents saved in Google Spaces

Excludes:

- Emails that lead to a business decision, action, process or completion of service and have a filing location in a paper file, Google folder or database.
- Transitory emails - refer to *2000 Transitory Information - 005 Transitory Information*.

Rules

Retention trigger: End of the year the email was sent or calendar invitation created

Retention period: 4 years

Based on: [Limitations Act](#)
Business requirements

Disposition: Destruction

Systems: Gmail
Google Calendar

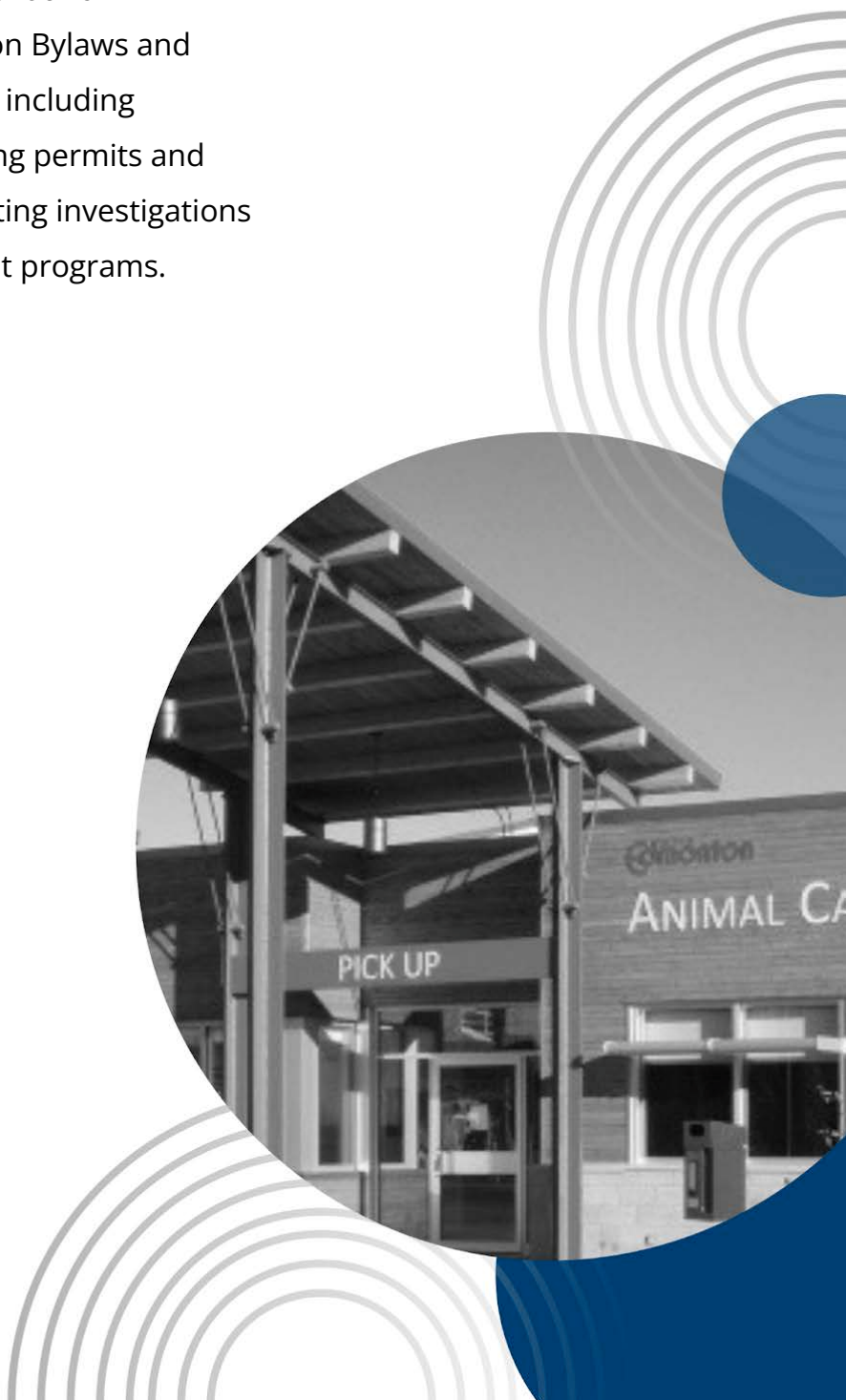
Security Class: Restricted

Notes

- There are very specific rules around managing email records. See the *Records Management for Google Administrative Guideline* for direction in managing transitory and non-transitory emails. If the email is transitory, please delete on a regularly scheduled basis. Weekly is recommended. Emails that provide evidence of work done or business decisions made will be moved to and filed under the appropriate record series.

2004 Bylaw Services and Enforcement

This function relates to enactment and enforcement of City of Edmonton Bylaws and Provincial Acts and Regulations, including processing complaints, approving permits and licenses, issuing tickets, conducting investigations and directing other enforcement programs.



005 Bylaw Complaints and Enforcement Administration

Information related to the administration of bylaw complaints and enforcement.

Includes but not limited to:

- Forms and templates
- Procedures, guidelines and process documents
- Reference materials

Excludes:

- N/A

Rules - 001 Forms, Templates and Reference Materials

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: Google and network drives

Security Class: Restricted

Rules - 002 Procedures, Guidelines and Process Documents

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Archives

Systems: Google and network drives

Security Class: Restricted

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

010 Bylaw Complaints and Enforcement

Information related to legislated enforcement of bylaw and provincial acts, issuing of warnings and tickets, and receiving bylaw complaints. Enforcement may include, but is not limited to, smoking violations, dogs at large, dog bites or attacks, unlicensed dogs, excessive barking and defecation, unlicensed businesses, municipal parking tickets, nuisance property, untidy or unsightly yards, noise complaints, graffiti, snow or ice on walkways and unauthorized signs on City property.

Includes but not limited to:

- Animal trap rental forms
- Appeals
- Court notifications
- Dispatch data
- Fines issued
- Investigations and follow-up
- Lost and found pets
- Orders to Remedy
- Tags and tickets
- Warning notices
- Withdrawal requests
- Witness statements

Excludes:

- Animal care - refer to *2008 Community Programs and Services - 030 Animal Care and Enclosures*.
- Billing costs to owners - refer to *2018 Financial Management - 010 Accounting*.
- Bylaws - refer to *2020 Governance - 030 Bylaws, City Policies and Procedures*.
- Facility information - refer to *2010 Corporate Lands and Property Management - 025 Facility and Grounds Operations*.
- Public education - refer to *2006 Communications and Public Relations - 060 Public Consultation*.

Rules

Retention trigger: Cancelled or completed

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: FINES
Google Drive
POSSE

Security Class: Restricted

Notes

- N/A

020 Development Compliance Administration

Information related to the administration of compliance and enforcement under *Zoning Bylaw 20001*.

Includes but not limited to:

- Business process improvements
- Manuals
- Procedures, guidelines and process documents
- Workflows

Excludes:

- N/A

Rules - 001 Business Process Improvements, Manuals and Workflows

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: Google and network drives

Security Class: Internal

Rules - 002 Procedures, Guidelines and Process Documents

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Archives

Systems: Google and network drives

Security Class: Internal

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

030 Development Compliance

Information related to the enforcement of compliance with Zoning Bylaw 20001. This includes unpermitted secondary suites and home-based businesses, as well as derelict housing, residential compliance tracking and safe housing committee files.

Includes but not limited to:

- Blueprints and drawings
- Complaints and CRM tickets
- Copies of permits
- Correspondence and job notes
- Geospatial information
- Penalty tickets
- Photographs
- Violation notices

Excludes:

- N/A

Rules

Retention trigger: Job completed

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: POSSE

Security Class: Restricted

Notes

- N/A

040 Licence and Permit Administration

Information related to the administration of business, personal agency, personal vehicle for hire and pet licenses, as well as community standards, fire services, parkland use and public places permits.

Includes but not limited to:

- Application packages
- Business process improvements
- Contacts and correspondence
- Information on how to obtain a licence
- Manuals
- Procedures, guidelines and process documents
- Program and service information, presentations and updates
- Workflows

Excludes:

- N/A

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: Business requirements

Disposition: Destruction

Systems: Google and network drives

Security Class: Internal

Notes

- Archives will receive procedures and guidelines.
- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 6 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 6 years prior to the disposition date

042 Business Licences

Information related to the approval of business licences under *Business Licence Bylaw 20002* for businesses such as agriculture and breeding, hospitality, professional services, retail, sales, rentals, trades, industrial and home-based businesses.

Includes but not limited to:

- Applications
- Approved licences
- Correspondence and job notes
- Incorporation documents
- Inspections
- Insurance
- Payment notices

Excludes:

- N/A

Rules

Retention trigger: Cancelled, expired or refused

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: POSSE

Security Class: Confidential

Notes

- N/A

044 Personal Agency Licences

Information related to licences issued to agencies for adult-oriented businesses defined under Business Licence Bylaw 20002 for adult theatre, body rub centres, escort agencies, exotic entertainment agencies, exotic entertainment venues and health enhancement centres.

Includes but not limited to:

- Applications
- Approved licences
- Correspondence and job notes
- Payment notices

Excludes:

- N/A

Rules

Retention trigger: Refused, revoked, cancelled or suspended

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: POSSE

Security Class: Restricted

Notes

- N/A

046 Personal Licences

Information related to licences issued to individuals for adult-oriented businesses defined under *Business Licence Bylaw 20002* for body rub practitioners, escorts, exotic entertainers and health enhancement practitioners.

Includes but not limited to:

- Applications
- Approved licences
- Correspondence and job notes
- Payment notices
- Proofs of completion in the body rub or escort information course
- Other supporting documentation

Excludes:

- N/A

Rules

Retention trigger: Refused, revoked, cancelled or suspended

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: POSSE

Security Class: Restricted

Notes

- N/A

048 Vehicle for Hire Licences

Information related to the issuing of licences to brokers, drivers and vehicles under *Vehicle for Hire Bylaw 17400*.

Includes but not limited to:

- Applications
- Approved licences
- Complaints and job notes
- Drivers licences and abstracts
- Inspections
- Insurance
- Payment notices
- Registrations
- Other supporting documentation

Excludes:

- N/A

Rules

Retention trigger: Cancelled, expired or refused

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: POSSE

Security Class: Confidential

Notes

- N/A

050 Pet Licences

Information related to the licensing of pets under *Animal Licensing and Control Bylaw 13145*. This includes applications, purebred registration, animal descriptions, tattoo and microchip numbers, pet owner names and addresses.

Includes but not limited to:

- Animal objects
- Application forms
- Job notes
- Licence numbers
- Renewal notices

Excludes:

- Bylaws - refer to *2020 Governance - 030 Bylaws, City Policies and Procedures*.
- Public education - refer to *2006 Communications and Public Relations - 060 Public Consultation*.

Rules

Retention trigger: Cancelled, expired, suspended, delinquent or NSF account

Retention period: 12 years

Based on: Average lifespan of an animal

Disposition: Destruction

Systems: POSSE

Security Class: Confidential

Notes

- Analytics metadata include data such as species and neighbourhood.

060 Community Standards Permits

Information related to issuing Community Standards permits in accordance with *Community Standards Bylaw 14600*. This includes noise permits and other permits completed for a particular use.

Includes but not limited to:

- Applications
- Payment notices
- Permits
- Registrations

Excludes:

- N/A

Rules

Retention trigger: Cancelled, expired or refused

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems:

Security Class: Confidential

Notes

- N/A

064 Fire Services Permits and Inspections

Information related to issuing permits in accordance with *Fire Rescue Services Bylaw 15309* and the prevention and compliance inspections of buildings and properties. This includes transportation of hazardous materials permits, dangerous goods transportation permits, firework and pyrotechnic permits, fire performer indoor venue permits and open burning permits by municipal address.

Includes but not limited to:

- Applications
- Blueprints and drawings
- Deficiency letters and reports
- Fire code compliance
- Inspections and follow-up
- Letters to owners
- Orders
- Payment notices
- Permits
- Registrations

Excludes:

- N/A

Rules

Retention trigger: Cancelled, expired or refused

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: POSSE

Security Class: Restricted

Notes

- N/A

068 Parkland Use Permits

Information related to issuing parkland use permits in accordance with *Parkland Bylaw 2202*. This includes permits related to carrying out any activity on parkland otherwise regulated, restricted or prohibited by *Parkland Bylaw 2202*. This may include but is not limited to, permits related to animals, fires, motor vehicles, aircraft use and fireworks on parkland.

Includes but not limited to:

- Applications
- Payment notices
- Permits
- Registrations

Excludes:

- N/A

Rules

Retention trigger: Cancelled, expired or refused

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems:

Security Class: Confidential

Notes

- N/A

070 Public Places Permits

Information related to issuing public places permits in accordance with *Public Places Bylaw 14614*. This includes permits for firearms.

Includes but not limited to:

- Applications
- Payment notices
- Permits
- Registrations

Excludes:

- N/A

Rules

Retention trigger: Cancelled, expired or refused

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: Google and network drives

Security Class: Confidential

Notes

- N/A

2006 Communications and Public Relations

This function relates to the communication of City of Edmonton products, services and programs, including public education, consultation, inquiries and feedback, media relations, event management, advertising and sponsorship.



005 Advertising and Campaigns

Information related to communications advertising and campaigns for a service or program.

Includes but not limited to:

- B-roll footage
- Consents to commercial electronic messages for adults and minors
- Consents to use images in photo and/or video for adults and minors
- Photos
- Videos

Excludes:

- N/A

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Archives

Systems: Google and network drives

Security Class: Confidential

Notes

- Archives is especially interested in internal newsletters.

008 City Identity

Information related to the City’s official identity.

Includes but not limited to:

- Awareness campaigns
- City crest, flag and logo
- City signatures
- City slogan
- Official colours and fonts
- Official swatches
- Procedures, guidelines and process documents

Excludes:

- Branch and program branding - refer to *2006 Communications and Public Relations - 040 Marketing and Promotions*.

Rules

Retention trigger: No longer in use

Retention period: 25 years

Based on: Business requirements

Disposition: Archives

Systems: Google and network drives

Security Class: Public

Notes

- N/A

010 Communications Administration

Information related to customer communication procedures and reports on a service or program.

Includes but not limited to:

- Contact lists
- Forms and templates
- Performance indicators and metrics
- Refresh documents
- Reports (for example, volumetric and performance reports)
- Reviews and sign-offs
- Service tracking
- Procedures, guidelines and process documents
- Standards

Excludes:

- N/A

Rules

Retention trigger: Current year

Retention period: 6 years

Based on:

Disposition: Destruction

Systems: Google and network drives

Security Class: Confidential

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 6 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 6 years prior to the disposition date

020 Customer Scripts and Messages

Information related to scripted and designed communications for a service or program.

Includes but not limited to:

- Automated phone system messaging scripts
- Call centre scripts (for example, 311 and Inside Information scripts)
- Codes associated with scripts
- Event scripts

Excludes:

- N/A

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: Potential for long term use

Disposition: Destruction

Systems: Google and network drives
SAP Customer Relations Manager (CRM)

Security Class: Confidential

Notes

- N/A

030 Feedback and Inquiries

Information related to a service, project or program or the performance of a task by a department, branch or section. Feedback may be used as a basis for improving performance, aligning expectations or addressing a specific matter.

Includes but not limited to:

- Appreciation, complaints, concerns, commendations and inquiries
- Arena client feedback
- Complaint accounts
- Complaint escalations
- Conversation log books
- Customer Relations Management (CRM) tickets
- Customer surveys
- Requests for service

Excludes:

- Council inquiries - refer to *2020 Governance - 120 Council Relations*.
- Individual employee feedback or inquiries - refer to *2022 Human Resource Management - 070 Employment Records*.
- Information requests and routine disclosures - refer to *2024 Information Management - 012 Access to Information*.

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: Google and network drives
POSSE
SAP Customer Relations Manager (CRM)

Security Class: Confidential

Notes

- N/A

040 Marketing and Promotions

Information related to promoting internal and external awareness of a service or program at the department, branch or section level.

Includes but not limited to:

- Artwork, illustrations and graphic designs
- Branding and merchandising
- Budget monitoring and planning
- Calendar of events, contact lists and distribution lists
- Communication plans
- Event family pre-letters and participation wishes
- Key messages, objectives, audience and goal identifications
- Logos, slogans, taglines and jingles
- Measurements and usability assessments
- Meeting agendas, minutes and supporting documentation
- Official fonts, colours and other visual elements
- Performance measures
- Plans, strategies, templates, research and reports
- Promotional product order forms, requests and distribution logs
- Promotional signage
- Quality assurance reviews
- Procedures, guidelines and process documents
- Standards
- SWAG (for example, t-shirts, lanyards, mouse pads, water bottles, thank you cards and dispensers)

Excludes:

- Vendor invoices and payments - refer to *2018 Financial Management - 012 Accounting - Third Party Invoices*.

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction
Archives (see notes)

Systems: Google and network drives

Security Class: Confidential

Notes

- Archives will receive artwork, illustrations, graphic designs, branding, merchandising, logos, slogans, taglines, jingles and promotional signage; key messages, objective, audience and goal identification; and plans, strategies, templates, research and reports.
- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

050 Media Relations

Information related to speaking engagements, media interviews and media monitoring.

Includes but not limited to:

- Calendars
- Contingency plans
- Death protocol plans (for example, plans for use in the event of the death of an employee or at a public facility)
- Interview preparation questions
- Invitations to speak
- Media releases
- Proactive messaging
- Presenter materials
- Speeches and speakers notes
- Speeches, proclamations, certificates and correspondence for City Council members

Excludes:

- N/A

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Archives

Systems:

Security Class: Restricted

Notes

- N/A

060 Public Consultation and Education

Information related to the public dissemination of information. This involves information that may directly or indirectly affect the public, including new ideas or concepts, awareness and knowledge building, feedback collection and collaboration with public stakeholders in decision-making, and development of solutions and recommendations.

Includes but not limited to:

- Calendars and timelines
- Contact lists and attendance lists
- Descriptions of events, issues, times and places
- Diagrams, graphs and displays
- Feedback, surveys, assessments and evaluations
- Forms, templates and checklists
- Invitations
- Legal notifications
- Media packages
- Meeting agendas and minutes
- Outreach processes
- Photos, videos and completed consent forms
- Plans, strategies and research (for example, public involvement plans)
- Presentations and publications (for example, for Fire Prevention Week)
- Procedures, guidelines and process documents
- Public engagement plans (for example. strategies, plans, execution reports and surveys)
- Public service announcements, newsletters, brochures, flyers and fact sheets
- Public tours (for example, station tours, ride-alongs and rig appearances)
- Reports and recommendations
- Risk analysis
- Stakeholder information

Excludes:

- N/A

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: Google and network drives

Security Class: Internal

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

080 Events

Information related to the planning and coordination of formal events, such as ceremonies, concerts, conferences, football and soccer games, international sporting events, workshops, open houses, festivals, speaking engagements, ball hockey events, gem shows and sporting events. This also includes informal staff events such as barbecues, Christmas parties, Corporate Challenge events and golf tournaments.

Includes but not limited to:

- Cash room and money drop locations
- Checklists and contact lists
- Event booking procedures
- Event parking maps and passes
- Forms and templates
- Geospatial information
- Invitations, pre-letters and RSVP tracking
- Lifecycle costing, forecasting and needs identification
- Meeting agendas, minutes and supporting documentation
- Permits
- Photos, videos and completed consent forms
- Plans, strategies and research
- Post event reviews
- Presentations, publications, signage and print materials
- Procedures, guidelines and process documents
- Registrations and tickets
- Schedules, deadlines and timelines (for example, for stage delivery)
- Sponsorship applications
- Surveys, research, studies, reports and statistics
- Venue information, logistics and booking confirmations

Excludes:

- Contracts and agreements - refer to *2032 Materials, Services and Equipment Management - 030 Procurement and Contract Management*.
- Large scale events - refer to *2034 Project Management*.

Rules - 001 Event Planning and Coordination Materials

Retention trigger: Current year

Retention period: 6 years

Based on:

Disposition: Destruction

Systems: Google and network drives

Security Class: Internal

Rules - 002 Meeting, Publicity, Procedural and Reporting Materials

Retention trigger: Current year

Retention period: 6 years

Based on:

Disposition: Archives

Systems: Google and network drives

Security Class: Internal

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 6 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 6 years prior to the disposition date
- Record types falling under Rule - 002 include the meeting agendas, minutes and supporting documentation; photos, video; publications and print materials; procedures, guidelines and process documents; and studies, reports and statistics for external events.

090 Website Administration

Information related to administering the external website, Google Sites, internal websites and social media.

Includes but not limited to:

- Web information architecture and web-related graphic design (for example, site maps)
- Web page cheat sheets, content, messaging, procedures and screenshots

Excludes:

- N/A

Rules

Retention trigger: Current year

Retention period: 4 years

Based on:

Disposition: Destruction

Systems:

Security Class: Confidential

Notes

- N/A

100 Sponsorships

Information related to sponsorship from private companies that supports Edmonton programs.

Includes but not limited to:

- Naming rights
- Product placement
- Program sponsor relationships

Excludes:

- Financial tracking - refer to *2018 Financial Management - 010 Accounting*.

Rules

Retention trigger: Sponsorship expiration date + renewal term

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Archives

Systems:

Security Class: Public

Notes

- N/A

2008 Community Programs and Services

This function relates to planning, consultation, development, delivery and monitoring of arts, culture, recreation, sports and social programs and services to citizens, communities and neighbourhoods.



010 Admissions

Information related to the administration of one-time admissions to public facilities, sites and events, including admissions to leisure facilities, golf courses and City attractions. This includes fee-setting documents and fee reduction applications that allow individuals, families and groups to participate in recreational opportunities at a reduced cost.

Includes but not limited to:

- Admission donations
- Applications
- Attendance
- Bulk admission and pass sales
- Fee listings, rates and schedules
- Golf reservations and cancellations
- Guest recovery
- Passes and pass orders
- Procedures, guidelines and process documents
- Promotional passes
- Referrals
- Refunds
- Rental discounts
- Reports and statistics
- Studies and verifications
- Tickets

Excludes:

- Facility and site operations - refer to *2010 Corporate Lands and Property Management - 025 Facility and Grounds Operations*.
- Memberships and registrations - refer to *2008 Community Programs and Services - 070 Memberships and Registrations*.
- Recreation programs - refer to *2008 Community Programs and Services - 080 Recreation, Leisure, Community and Culture Programs*.
- Social programs - refer to *2008 Community Programs and Services - 020 Social Programs*.

Rules

Retention trigger: Current year

Retention period: 6 years

Based on: [Income Tax Act](#)

Disposition: Destruction

Systems: Active (golf)
Google and network drives

Security Class: Confidential

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 6 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 6 years prior to the disposition date

020 Animal Care and Enclosures

Information related to the identification and daily care of animals and their enclosures.

Includes but not limited to:

- Animal keepers logs
- Animal transfers
- Animal waste and sewage disposal
- Cleaning schedules
- Clinic permits
- Clinical summaries
- Daily shift logs
- Diet and fact sheets
- Feeding and behaviour logs
- Genealogy and history
- Laboratory reports (autopsies, biopsies)
- Procedures, guidelines and process documents
- Schedules
- Statistics
- Treatment forms
- Veterinary sheets

Excludes:

- Facility maintenance - refer to *2010 Corporate Lands and Property Management - 010 Attractions, Recreation and Leisure Centre Operations*.
- Partners and affiliates - refer to *2020 Governance - 150 Intergovernmental and External Relations*.

Rules

Retention trigger: Life of animal or until transfer

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: Zoological Information Management System (ZIMS)

Security Class: Confidential

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

030 Awards and Recognition

Information related to identifying and providing recognition to individuals, groups and organizations that add value to the City and its residents.

Includes but not limited to:

- Agenda and minutes
- Award and recognition criteria
- Financial information
- Membership
- Nomination forms
- Procedures, guidelines, process documents and templates
- Reports and statistics
- Terms of reference

Excludes:

- Accounting, budgets and grants - refer to *2018 Financial Management*.
- Community Services Advisory Board - refer to *2020 Governance - 090 Council and Standing Committee Meeting Files*.
- Websites - refer to *2006 Communications and Public Relations - 090 Website Administration*.

Rules - 001 Meeting Materials, Criteria, Procedures, Reporting and Terms of Reference

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Archives

Systems:

Security Class: Internal

Rules - 002 Financial Information, Membership And Nomination Forms

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems:

Security Class: Internal

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

040 Cemetery Applications, Ledgers and Permits

Information related to burial and to the deceased and their family.

Includes but not limited to:

- Applications to inter and licences
- Burial and monument permits
- Cemetery plots and locations
- Family statistics
- Geospatial information
- Internments
- Official ledgers

Excludes:

- Accounting, budgets and grants - refer to *2018 Financial Management*.
- Events, websites or sponsorships - refer to *2006 Communications and Public Relations - 080 Events*.
- Facility and site maintenance - refer to *2010 Corporate Lands and Property Management - 020 Cemetery Operations*.
- Incident reports - refer to *2030 Legal Services - Public Incident Reporting*.
- Loss damage and statements of claim - refer to *2030 Legal Services - 060 Litigation and Prosecution*.
- Official strategic plans - refer to *2020 Governance - 200 Strategic Planning*.
- Partnerships - refer to *2020 Governance - 150 Intergovernmental and External Relations*.

Rules

Retention trigger: Permanent

Retention period: Permanent

Based on: [Cemeteries Act](#)
[Cemeteries Act General Regulation](#)

Disposition: Permanent

Systems: Automated Cemeteries System (ACS)

Security Class: Confidential

Notes

- N/A

050 Client Services

Information related to assessment and short-term counselling services provided to individuals, families, groups and communities in need requesting social service assistance.

Includes but not limited to:

- Assessments and audits
- Calendar and schedules
- Client transportation arrangements
- Confidential evaluations
- Eligibility criteria documentation
- Interviews
- Manuals, practices and guidelines
- Personal profiles, service plans and workers notes
- Referral information, waivers and medical reports

Excludes:

- Social programs - refer to *2008 Community Programs and Services - 090 Social Programs*.
- Volunteer programs - refer to *2022 Human Resource Management - 200 Volunteers*.

Rules - 001 Adult

Retention trigger: File closure

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: Automated Community Based Social Services System (CBSS)
POSSE

Security Class: Confidential

Rules - 002 Minor

Retention trigger: File closure

Retention period: Date minor reaches 18 years of age + 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: Automated Community Based Social Services System (CBSS)
POSSE

Security Class: Confidential

Notes

- N/A

055 Client Services Administration

Information related to the administration of client services including forms, procedures, schedules and reports.

Includes but not limited to:

- Contact lists
- Forms and templates
- Performance indicators and metrics
- Procedures, guidelines and process documents
- Reports (for example, volumetric and performance reports)

Excludes:

- N/A

Rules

Retention trigger: Current year

Retention period: 6 years

Based on:

Disposition: Destruction

Systems: Google and network drives

Security Class: Confidential

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 6 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 6 years prior to the disposition date

060 Community and Organizational Development

Information related to community and organizational development that provides assessments, plans and resources to identify social and recreation needs and issues for boards, individuals, groups, organizations, communities and special populations. Programs may include corporate coordination, Edmonton Federation of Community Leagues, community incentives and partnerships.

Includes but not limited to:

- Agendas and minutes
- Committees documentation
- Development requests and background information
- Evaluations
- Financial information
- Forms and templates
- Geospatial information
- Neighbourhood work plans
- Procedures, guidelines and process documents
- Profiles
- Program scope and costs
- Reports and statistics
- Studies and surveys
- Terms of reference

Excludes:

- Contracts and agreements - refer to *2032 Materials, Services and Equipment Management - 030 Procurement and Contract Management*.
- Neighbourhood and revitalization projects - refer to *2034 Project Management*.
- Strategic and annual plans - refer to *2020 Governance - 200 Strategic Planning*.
- Volunteer programs - refer to *2022 Human Resource Management - 200 Volunteers*.

Rules - 001 Program Development, Financial Information, Forms, Plans and Profiles

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: Google and network drives

Security Class: Confidential

Rules - 002 Meeting Materials, Committee Documentation, Reporting, Studies and Program Scope and Costs

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Archives

Systems: Google and network drives

Security Class: Confidential

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

070 Memberships and Registrations

Information related to the membership and program registration of participants in public facilities, sites and events, such as leisure facilities, golf courses and city attractions. This also includes applications for legacy programs (benchmark, commemorative trees, carousel horse and zoo animals).

Includes but not limited to:

- Applications and registrations
- Attendance lists
- Cancellations
- Certificates
- Leisure access cards
- Memberships (monthly, community league, corporate)
- Procedures, guidelines and process documents
- Refunds
- Reports and statistics
- Tickets
- Waivers

Excludes:

- Facility and site operations - refer to *2010 Corporate Lands and Property Management - 025 Facility and Grounds Operations*.
- Recreation programs - refer to *2008 Community Programs and Services - 080 Recreation, Leisure, Community and Culture Programs*.

Rules

Retention trigger: Registered program expired, cancelled or completed

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: RAMS

Security Class: Confidential

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

075 Housing Programs

Information related to delivering adequate, safe and affordable housing, and to addressing the underlying contributors of homelessness in the city. This includes initiatives to address homelessness; policy, planning and research related to affordable housing and homelessness; development of new affordable and mixed-income housing; and eviction prevention through the Landlord Tenant Advisory Board.

Includes but not limited to:

- Agreements
- Applications
- Committees and task forces
- Complaints
- Interviews
- Mediation
- Meetings
- Procedures and processes
- Reports and statistics
- Tenant information

Excludes:

- Asset and property management - refer to *2010 Corporate Lands and Property Management - 060 Property Management*.
- Funds and grants - refer to *2018 Financial Management - 030 Grants and Other City Contributions*.
- Projects - refer to *2034 Project Management*.

Rules

Retention trigger: Agreement expiry

Retention period: 10 years

Based on:

Disposition: Destruction

Systems: POSSE
Tririga

Security Class: Confidential

Notes

- N/A

080 Recreation, Leisure, Community and Culture Programs

Information related to specific program development, scheduling and delivery of various community, greening, recreational, cultural and leisure programs for children and youth, adults, senior citizens, communities, groups and special populations.

Includes but not limited to:

- Activity records
- Community-based program reviews
- Curriculum
- Evaluations and program materials
- Geospatial information
- Maps and plans
- Procedures, guidelines and process documents
- Profiles
- Program evaluations
- Reports and statistics
- Schedules
- Site visit tracking and workbooks
- Training materials

Excludes:

- Accounting, budgets and grants - refer to *2018 Financial Management*.
- Facility maintenance - refer to *2010 Corporate Lands and Property Management - 010 Attractions, Recreation and Leisure Centre Operations*.
- Program applications and registration - refer to *2008 Community Programs and Services - 070 Memberships and Registrations*.
- Websites - refer to *2006 Communications and Public Relations - 090 Website Administration*.

Rules - 001 Program Development, Scheduling and Delivery

Retention trigger: End of program

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems:

Security Class: Confidential

Rules - 002 Procedures, Program Evaluations, Reporting and Photos

Retention trigger: End of program

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Archives

Systems:

Security Class: Confidential

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

090 Social Programs

Information related to assessing, developing, implementing and evaluating social issues, programs and activities. Programs are designed for all demographics including but not limited to senior citizens, children and youth, families, groups, neighbourhoods, communities and special populations. Programs may pertain to but are not limited to addictions, anger-conflict resolutions, bullying, child care emergency resources, child and family violence, clothing resources, emergency funding, emergency protection orders, ethnocultural groups, faith groups, food bank, furniture moving and donation, grief and loss, housing resources, Indigenous groups, legal resources, medical and dental resources, men's services, mental health, narrative therapy, parenting, pets, safety plans, snow shovelling, yard work, social justice and solution-focused therapy.

Includes but not limited to:

- Evaluations and background information
- Interview and screening processes
- Needs assessments and recognition
- Program development
- Program policies and procedures
- Reports and statistics
- Session outlines
- Work area assignments

Excludes:

- Accounting, budgets and grants - refer to *2018 Financial Management*.
- City policies and procedures - refer to *2020 Governance - 030 Bylaws, City Policies and Procedures*.
- Community Services Advisory Board (CSAB) - refer to *2020 Governance - 090 Council and Standing Committee Meeting Files*.
- Partnerships and inter-agency - refer to *2020 Governance - 150 Intergovernmental and External Relations*.
- Websites - refer to *2006 Communications and Public Relations - 090 Website Administration*.

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems:

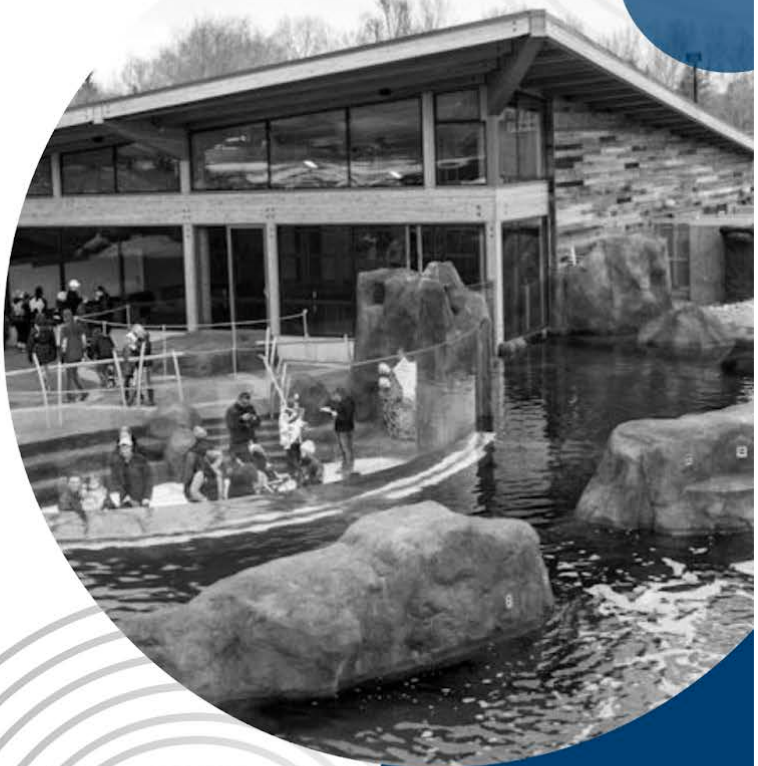
Security Class: Confidential

Notes

- N/A

2010 Corporate Lands and Property Management

This function relates to the administration and management of land and property owned, leased or maintained by the City of Edmonton, including the acquisition of land for future civic growth, the development of serviced (that is, infrastructure) lands for residential and industrial purposes and the preservation of natural areas and biodiversity.



005 Corporate Lands and Property Administration

Information related to the administration of corporate lands and property.

Includes but not limited to:

- Forms, templates and letters
- Meeting agendas, minutes and supporting documents
- Procedures, guidelines and process documents
- Reports, listings, maps and specifications

Excludes:

- Executive Leadership Team (ELT) reports - refer to *2020 Governance - 170 Organizational Reports*.

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Archives

Systems:

Security Class: Confidential

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

007 Annexation

Information related to the change to boundaries between one or more municipalities. Annexation may expand boundaries to accommodate future growth, bring together unconnected pieces of land resulting from building a road, solve a development problem or provide mutually agreed-upon services.

- Includes but not limited to:
- Annexation application reports for COE submission to province
 - Annexation proposals
 - Geospatial information
 - Maps
 - Procedures, guidelines and process documents

- Excludes:
- N/A

Rules

- Retention trigger: Final Board Order
- Retention period: Permanent
- Based on: Business requirements
- Disposition: Permanent
- Systems: Google Drive
POSSE
- Security Class: Confidential

Notes

- N/A

010 Attraction, Recreation and Leisure Centre Operations

Information related to the facility and site operations and daily maintenance of recreation centres, leisure centres, pools, arenas and stadiums. This may include information about facility preparation for events and physical plant procedures and forms, inspections, samples, tests and reports.

Includes but not limited to:

- Blueprints, plans and maps
- Charts and checklists (amenities, chemical addition, personal protective equipment, safety)
- Deck attendance sheets
- Forms and templates (bacterial samples, pool clear, infection control, loose fecal tracking)
- Inspections (risk and fire)
- Inventories (chemical, equipment, first aid, janitorial supplies, radio)
- Licences and permits (Alberta Health Services (AHS))
- Lost and found log
- Procedures, guidelines and process documents (chemical addition, backwash, chemical, underwater vacuum, lane rope repair, locker operations, boot cleaner, pool chair lift, sauna, steam room, swimsuit spinner)
- Requests
- Schedules
- Shutdowns
- Signage
- Waste receptacles and recycle bins

Excludes:

- Accounting, budgets and grants - refer to *2018 Financial Management*.
- Events - refer to *2006 Communications and Public Relations - 080 Events*.
- Partnerships - refer to *2020 Governance - 150 Intergovernmental and External Relations*.
- Recreation programs - refer to *2008 Community Programs and Services - 080 Recreation, Leisure, Community and Culture Programs*.
- Reservations, registrations and memberships - refer to *2008 Community Programs and Services - 070 Memberships and Registrations*.
- Sponsorship - refer to *2006 Communications and Public Relations - 100 Sponsorships*.

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)
[Occupational Health and Safety Code, Alta Reg 191/2021](#)

Disposition: Destruction

Systems:

Security Class: Restricted

Notes

- Lost and found items are kept according to the *Lost and Found Procedure*.
- Archives will receive blueprints, plans and maps.
- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

015 Bookings and Rentals

Information related to the rental and booking of City facilities and sites. This may include monitoring, issue resolution, placement and evaluation for street vendors and food service areas, arenas, picnic sites, fitness centres, pools, tennis courts, school gymnasiums, sports fields, rooms and equipment.

Includes but not limited to:

- Applications
- Cancellations and evaluations
- Contracts
- Disbursements
- Fees and charges
- Joint use agreements
- Permits
- Procedures, guidelines and process documents
- Reconciliations
- Reports and statistics
- Schedules

Excludes:

- Admissions and passes - refer to *2008 Community Programs and Services - 010 Admissions*.
- Recreation programs - refer to *2008 Community Programs and Services - 080 Recreation, Leisure, Community and Culture Programs*.
- Registrations and memberships - refer to *2008 Community Programs and Services - 070 Memberships and Registrations*.

Rules

Retention trigger: Completion, expiration or cancellation of booking or rental

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: RAMS

Security Class: Confidential

Notes

- Archives will receive joint use agreements.
- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

020 Cemetery Operations

Information related to the facility and site operations and daily maintenance of municipal cemeteries. This may include cleaning offices, rooms and restrooms, replenishing restroom supplies, painting surfaces, set-up or removal of folding tables, chairs, barricades or similar objects, moving and repairing equipment and furniture, preparing facilities for events and operating various types of equipment and vehicles.

Includes but not limited to:

- Access and accessibility
- Alarms
- Blueprints, plans and maps
- Charts and checklists
- Custodial and janitorial records
- Elevator specifications
- Geospatial information
- Inspections (risk and fire)
- Logs and backup materials
- Maintenance (columbarium, flower beds, grade beam, monument restorations, plots, irrigation, turf)
- Parking
- Permits
- Procedures, guidelines and process documents (burial customs, columbarium specifications, interment set-ups, cremation, crypt, indoor niche, traditional)
- Public announcement systems
- Schedules
- Shutdowns
- Signage
- Trouble calls
- Waste receptacles and recycle bins
- Work plans

Excludes:

- Accounting, budgets and grants - refer to *2018 Financial Management*.
- Burial permits and applications - refer to *2008 Community Programs and Services - 040 Cemetery Applications, Ledgers and Permits*.
- Events - refer to *2006 Communications and Public Relations - 080 Events*.
- Incident reports - refer to *2030 Legal Services - Public Incident Reporting*.
- Partnerships - refer to *2020 Governance - 150 Intergovernmental and External Relations*.
- Recreation programs - refer to *2008 Community Programs and Services - 080 Recreation, Leisure, Community and Culture Programs*.
- Reservations, registrations and memberships - refer to *2008 Community Programs and Services - 070 Memberships and Registrations*.
- Sponsorships - refer to *2006 Communications and Public Relations - 100 Sponsorships*.

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Cemeteries Act](#)
[Limitations Act](#)
[Occupational Health and Safety Code, Alta Reg 191/2021](#)

Disposition: Destruction

Systems: Automated Cemeteries System (ACS)

Security Class: Restricted

Notes

- Archives will receive blueprints, plans and maps; and procedures, guidelines and process documents.
- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

025 Facility and Grounds Operations

Information related to the maintenance of facilities and grounds. This also includes flowerbeds, irrigation and turf maintenance.

Includes but not limited to:

- Accessibility plans (for example, building and seating plans)
- Custodial services (cleaning and janitorial)
- Geospatial information
- Inventories of facility buildings and lands
- Job tickets
- Key lists
- LEED requirements
- Logs
- Maintenance concerns
- Maintenance requests and work orders
- Maintenance schedules
- Maintenance shutdown planning (for example, pool shutdowns)
- Planning documents (for example, landscape, cell towers, seats, wayfinding signs, window coverings, studio equipment)
- Procedures, guidelines and process documents
- Sign in and sign out logs
- Site contents photos
- Specifications (for example, field cover, turf)
- Utility and energy management (outage notification, meter billing applications, measurement and verification tracking, utility estimations)

Excludes:

- Custodial services, office furniture tracking and planning, phone requests and records, power and electricity usage and cable services - refer to *2032 Materials, Services and Equipment - 020 Maintenance and Use*.
- Equipment or supply inventories - refer to *2032 Materials, Services and Equipment - 040 Routine Purchases*.
- Loss/damage reports - refer to *2012 Corporate Security Services - 020 Security Incidents*.
- Maintenance contracts - refer to *2032 Materials, Services and Equipment - 030 Procurement and Contract Management*.

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction, Archives (see notes)

Systems:

Security Class: Confidential

Notes

- Archives will receive inventories of buildings and land, maintenance shutdown, procedures, guidelines and process documents.

030 Parks and Land Maintenance

Information related to the daily maintenance and custodial activities of landscaped and natural areas, fields and playgrounds, parks and school sites. This may also include gardening, mowing, applying herbicide and fertilizer, trimming and pruning tree branches and shrubs, repairing benches, bleachers, tables and equipment, digging the ground for flower beds and ditches, preparing sports fields, performing pest management and operating various types of equipment and vehicles.

Includes but not limited to:

- Fencing, bollards and stairs
- Field markings
- Garbage collection
- Geospatial information
- Homeless camp removal
- Inspections (playspaces)
- Inventories (bridges, picnic sites, trails, natural areas)
- Maintenance (sports fields, diamonds, tennis fields, tracks, ice, toboggan hills, water features, parking lots, roadways and sidewalks)
- Park furniture construction and repair
- Signage
- Snow removal
- Spring sweeping
- Tree lighting logistics documentation
- Turf rehabilitation

Excludes:

- Recreation programs - refer to *2008 Community Programs and Services - 080 Recreation, Leisure, Community and Culture Programs*.
- Sport field and picnic site bookings - refer to *2010 Corporate Lands and Property Management - 015 Bookings and Rentals*

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)
[Occupational Health and Safety Code, Alta Reg 191/2021](#)

Disposition: Destruction

Systems:

Security Class: Confidential

Notes

- Archives will receive procedures, guidelines and process documents.

040 Property Acquisitions

Information related to the acquisition of real estate interests. Acquisitions are conducted through a variety of methods, including negotiated purchase, land exchanges, nominal dedications and expropriation.

Includes but not limited to:

- Acquisition agreements
- Geospatial information
- Internal purchase requests (IPRs)
- Land exchanges and exchange agreements
- Land needs identification
- Letters of offer
- Negotiations and offerings
- Policies and procedures
- Purchase values
- Rights of entry
- Site plans
- Standard terms and conditions
- Titles and registered documents

Excludes:

- Annexation - refer to *2010 Corporate Lands Property Management - 007 Annexation*.

Rules

Retention trigger: Title transfer

Retention period: Permanent

Based on: [Municipal Government Act](#)
[Electronic Transactions Act](#)
Business requirements

Disposition: Permanent

Systems: Google and network drives
Paper files
POSSE

Security Class: Confidential

Notes

- N/A

045 Property Appraisals

Information related to real estate appraisals involving all types of real estate, including industrial, commercial and investment (ICI) properties, development land parcels, single-family housing, school sites and other publicly zoned properties.

Includes but not limited to:

- Appraisal processes
- Appraisal reviews
- Geospatial information
- Maps
- Reports

Excludes:

- N/A

Rules

Retention trigger: Current year

Retention period: 25 years

Based on:

Disposition: Archives

Systems: Google and network drives
Tririga

Security Class: Confidential

Notes

- N/A

050 Property Development

Information related to property development of City-owned surplus land to facilitate various City initiatives and programs. These developments result in a variety of land uses, such as residential, commercial and industrial, by using surplus school sites and surplus civic properties.

- Includes but not limited to:
- Geospatial information
 - Reserve designation

- Excludes:
- N/A

Rules

Retention trigger: End of project

Retention period: 25 years

Based on:

Disposition: Archives

Systems:

Security Class: Internal

Notes

- N/A

055 Property Leases

Information related to leasing or licensing space not currently needed for civic purposes or to acquiring space to lease for civic purposes. This includes space for commercial, residential, utility and garden plot uses.

Includes but not limited to:

- Blueprints and plans
- Geospatial information
- Leasing space requirements
- Notifications
- Payment receipts and tracking
- Photographs
- Property inquiries
- Property listings
- Responses
- Standard lease assignment agreements
- Tax recovery

Excludes:

- N/A

Rules

Retention trigger: Lease agreement signed

Retention period: Permanent

Based on: [Municipal Government Act](#)
[Electronic Transactions Act](#)
Business requirements

Disposition: Permanent

Systems: Google and network drives
Paper files

Security Class: Restricted

Notes

- N/A

060 Property Management

Information related to assessing, inspecting and reporting on the condition of City land, facilities and properties. This includes the activities to identify and inventory the City's land and buildings, accommodation planning, accommodation transformation and property management oversight to ensure adequate services are maintained to sustain leased or owned assets.

Includes but not limited to:

- Accommodation requests
- As-built documentation
- Building and land inventory
- Building condition assessments
- Civic accommodation plans
- Conditional reports
- Construction Completion Certificates (CCCs)
- Energy assessments
- Equipment upgrade reports
- Facility evaluations
- Feasibility studies
- Final Acceptance Certificates (FACs)
- Floor plans
- Geospatial information
- Roof reports
- Schematic designs
- Survey reports
- Technical evaluations

Excludes:

- Building improvement and renovation projects - refer to *2034 Project Management - 015 Infrastructure Projects*.
- Day-to-day maintenance and operations of facilities - refer to *2010 Corporate Lands and Property Management - 025 Facility and Grounds Operations*
- Utility right of ways on City-owned land, right of entry agreements and crossing agreements - refer to *2028 Land Use Management - 020 Land Use Agreements*.

Rules

Retention trigger: Property sold

Retention period: 12 years

Based on: [Limitations Act](#)
Business requirements

Disposition: Archives

Systems: Tririga

Security Class: Internal

Notes

- N/A

065 Property Sales

Information related to marketing and selling real estate interests. The City sells developed and surplus City properties, including commercial sales, industrial sales, commercial lane closures and residential sales.

Includes but not limited to:

- Buyers' applications
- Commission agreements
- Forms and agreements
- Geospatial information
- Land titles
- Letters of offer
- Offer evaluations
- Policies and procedures
- Property inquiries
- Property listings
- Road closure bylaws
- Sales agreements
- Sales approvals
- Standard terms and conditions
- Status reports

Excludes:

- N/A

Rules

Retention trigger: Title transfer

Retention period: Permanent

Based on: [Electronic Transactions Act](#)
[Municipal Government Act](#)
Business requirements

Disposition: Permanent

Systems: Google and network drives
Paper files

Security Class: Confidential

Notes

- N/A

070 Roadway and Traffic Operations

Information related to ensuring that streets, roads, sidewalks, traffic control and infrastructure assets such as bridges remain accessible, attractive and safe. Work includes repairs and maintenance, seasonal clean-up, traffic signals and street lights, traffic cameras and traffic safety. This also includes the operations of the asphalt plant, as well as monitoring and complying with federal and provincial regulations.

Includes but not limited to:

- Approved plans and drawings of major or minor maintenance work
- Bike routes and parking maps
- Bridge inventories
- Bridge overloads assessments and notifications
- Bridge washing documentation
- Completion certificates
- Cracks, sealing and resealing documentation
- Curb ramp specifications
- Geospatial information
- Grind and pave documentation
- Inspections
- Line marking documentation
- Manhole adjustment documentation
- Maps
- Notifications (traffic disruption, road opening or closing)
- Parkade and parking meter maintenance schedules
- Paving documentation
- Photographs
- Plans (severe snow events)
- Procedures, guidelines and process documents
- Schedules (for example, snow removal, spring sweeping)
- Sidewalk documentation
- Specifications
- Traffic cameras, lights and signals documentation
- Traffic restrictions, bans and zones documentation
- Work orders

Excludes:

- Claims - refer to *2030 Legal Services - 060 Litigation and Prosecution*.
- Engineering, analysis and test results - refer to *2028 Land Use Management - 030 Infrastructure Engineering*.
- Equipment maintenance - refer to *2032 Materials, Services and Equipment - 020 Maintenance and Use*.
- Fleet maintenance - refer to *2032 Materials, Services and Equipment - 015 Fleet Maintenance*.
- Planning and designing infrastructure - refer to *2028 Land Use Management - 028 Infrastructure Planning*.
- Roadway renewals and infrastructure construction projects - refer to *2034 Project Management*.

Rules

Retention trigger: Current year

Retention period: 50 years

Based on: [Occupational Health and Safety Code, Alta Reg 191/2021](#)
Business requirements

Disposition: Destruction

Systems:

Security Class: Confidential

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 50 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 50 years prior to the disposition date.

080 Staff Parking Reports and Tracking

Information related to the administration and arrangement of City staff parking.

Includes but not limited to:

- Building and stall allocations
- Forms and templates
- Logs or registers
- Parking permits and passes
- Procedures, guidelines and process documents
- Reports and statistics
- Temporary suspensions
- Vehicle and staff information

Excludes:

- Individual employment records - refer to *2022 Human Resource Management - 070 Employment Records*.
- Parking reimbursement - refer to *2018 Financial Management - 010 Accounting*.

Rules

Retention trigger: Current year

Retention period: 2 years

Based on: Business requirements

Disposition: Destruction

Systems:

Security Class: Internal

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 2 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 2 years prior to the disposition date.

2012 Corporate Security Services

This function relates to the planning , designing, monitoring, investigating and administering of Corporate Security Services and programs..



010 Security Administration

Information related to providing resistance to, or protection from, harm by controlling access and implementing other security methods.

Includes but not limited to:

- Access control protocols (for example, mechanical, electronic, identification systems and access policies)
- Access requests, security passes, identification cards and appeals (for example, additions and changes, after hours, ID cards, seasonal hires)
- Alarm responses, systems and reports
- Assessments, audits and evaluations
- Crime and theft prevention recommendations (for example, warning signs, window stickers, fences, height restrictions, restricted access points, security lighting and trenches)
- Customer data cards
- Executive protection
- Guard bookings and requests and special duty police schedules
- Investigation administration
- Key control, assignments and request forms
- Lists (contact, facility, banned persons, offline devices)
- Meeting agendas, minutes and supporting documentation
- Mobile responses
- Policies and rules (for example, theft prevention, alarms)
- Procedures, guidelines and process documents
- Reports (for example, incident reports, Paladin, safety, site security, vandalism)
- Suspension of privileges tracking
- Tests (for example, vulnerability)

Excludes:

- Personnel clearances and driver permits - refer to *2022 Human Resource Management - 070 Employee Records*.
- Presentations to outside agencies - refer to *2006 Communications and Public Relations - 060 Public Consultation and Education*.
- Statistical reports and weekly reports - refer to *2020 Governance - 170 Organizational Reports*.

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems:

Security Class: Restricted

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

020 Security Incidents

Information related to security incidents such as theft, vandalism, suspicious activity and verbal or physical abuse.

Includes but not limited to:

- Audits
- Contact lists
- Forms and templates
- Impact assessments and analysis
- Insurance
- Police reports
- Post-incident reviews
- Processes
- Recoveries
- Reports (for example, incident, investigation and loss damage reports)
- Risk assessments, cases, control inspections (RCIs) and request logs
- Risk mitigation recommendations
- Statements of claim
- Witness statements

Excludes:

- Information breaches - refer to *2024 Information Management - 016 Privacy Protection*.
- Security contracts - refer to *2032 Materials, Services and Equipment Management - 030 Procurement and Contract Management*.

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: Restricted

Notes

- N/A

030 Security Standards

Information related to security planning, procedures, standards and Working Alone forms.

Includes but not limited to:

- Facility security standards
- Procedures, guidelines and process documents (for example, Abusive Patron Intoxication, Alcohol Inside Facilities, Caregiver Ratios, Child Within Arm's Reach, Emergent Incident, Intoxicating Substances, Security)
- Sites and floor plans
- Working Alone forms

Excludes:

- N/A

Rules

Retention trigger: Potential for litigation has passed

Retention period: 30 years

Based on: [Limitations Act](#)

Disposition: Archives

Systems:

Security Class: Restricted

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 25 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 25 years prior to the disposition date.

040 Security Surveillance

Information related to surveillance footage.

Includes but not limited to:

- CCTV camera data
- Video surveillance tapes

Excludes:

- N/A

Rules

Retention trigger: Current day

Retention period: 31 days

Based on: Business requirements

Disposition: Destruction

Systems:

Security Class: Restricted

Notes

- N/A

045 Security Surveillance Incidents

Information related to surveillance footage related to reported incidents.

- Includes but not limited to:
- CCTV camera data
 - Requests for CCTV camera data
 - Video surveillance tapes

- Excludes:
- N/A

Rules

Retention trigger: Current day

Retention period: 1 year

Based on: [Protection of Privacy Act](#)

Disposition: Destruction

Systems:

Security Class: Restricted

Notes

- N/A

2016 Emergency Services

This function relates to protecting life, property and the environment through emergency programs and services, including fire suppression, investigation, prevention and response to residential traffic collisions and dangerous goods.



010 Emergency Preparedness

Information related to minimizing potential harm to the safety, health or welfare of people or widespread damage to property in the event of an emergency.

Includes but not limited to:

- Alerts
- Area impact monitoring reports and procedures
- Checklists
- Client evacuation plans
- Communications plans
- Contact and call-out lists
- Emergency response plans
- Forms and templates
- Geospatial information
- Maps (for example, evacuation)
- Meeting agendas, minutes and supporting documentation
- Plans (for example, action, business continuity, contingency, disaster, business recovery, evacuation, implementation, management, logistical, mitigation, preparation, pandemic and recovery plans)
- Pre-incident planning
- Procedures, guidelines and process documents (for example, Emergency Response Manual)
- Reactivation strategies
- Recovery and option reports
- Registers
- Response tests and dry run reports
- Risk assessments and identifications
- Severity 1 processes, guides, reporting and manuals
- Sourcing lists and inventories (for example, supply, equipment)
- Strategies and research
- Training exercises

Excludes:

- Emergency events - refer to *2016 Emergency Services - 020 Emergency Response Operations*.
- First aid and fire safety - refer to *2022 Human Resource Management - 090 Occupational Health and Safety*.
- Investigations - refer to *2016 Emergency Services - 025 Emergency Response Investigations*.

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction
Archives (see notes)

Systems:

Security Class: Restricted

Notes

- Archives will receive plans, including action, business continuity, contingency, disaster, business recovery, evacuation, implementation, management, logistical, mitigation, preparation, pandemic and recovery plans.
- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

020 Emergency Response Operations

Information related to the operation of front-line response to a range of emergency events. This includes but is not limited to the response to emergency events and technical services such as dispatch and communications.

Includes but not limited to:

- Activity logs
- Emergency Operations Centre activations
- Emergency Social Services activations
- Fire event details (location, vehicles)
- Geospatial information
- Letters to owners
- Paging FRS Personnel
- Photos and associated consent forms
- Reports (event, summary, hazmat, operation, narrative, automatic vehicle location, patient care - PCR)
- Response codes (emergency non-life threatening, potential life-threatening, fire alarms, false fire alarms, bomb and explosion, dangerous goods, fire drills or alarms servicing permits)
- Service request
- Technical rescues (water rescue and investigation, animal rescues)
- Traffic control (7- and 10-minute prevention planning)
- Unit history and job history
- Voice recordings

Excludes:

- Evidence for fire investigations - refer to *2016 Emergency Services - 025 Emergency Response Investigations*.
- Training - refer to *2022 Human Resource Management - 190 Training*.
- Watch-IT only stores log data - refer to *2000 - 020 Quality Control*.

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: Computer-Aided System (CAD)
RM System
Google Drive

NICE
Watch-IT

Security Class: Restricted

Notes

- Fire ProQA data is transitory and kept for 30 days.
- Computer-Aided Dispatch System (CAD) fire events details kept for 220 days, data will be transferred into RMS.

025 Emergency Response Investigations

Information related to investigating and documenting the cause, origin and circumstances of fire and explosions within the City of Edmonton.

Includes but not limited to:

- Final Fire Investigation Reports
- Fire Damage Reports
- Fire Incident Reports
- Fire Investigations

Excludes:

- Emergency events not resulting in an investigation - refer to *2016 Emergency Services - 020 Emergency Response Operations*.

Rules

Retention trigger: Current year

Retention period: 25 years

Based on:

Disposition: Archives

Systems: RMS system

Security Class: Restricted

Notes

- N/A

040 Public Safety and Prevention Programs

Information related to developing and delivering public safety education and awareness programs.

Includes but not limited to:

- Barbeques on balconies
- Child firesetters
- Fire bans
- Overcrowding and occupant load

Excludes:

- Fire services inspections and permits - refer to *2004 Bylaw Services and Enforcement - 064 Fire Services Permits and Inspections*.
- Fuel storage tank systems - refer to *2018 Land Use Management - 060 Fuel Storage Tank System Permits*.

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems:

Security Class: Confidential

Notes

- These records are not specific to addresses.

2018 Financial Management

This function relates to the planning, administering, monitoring and reporting of revenue, expenditures and funding for City initiatives, programs and services, including accounting, budgeting, cash-handling, investing and forecasting.



010 Accounting

Information related to administering, tracking and managing expenditures and revenues (accounts receivable and cash operations).

Includes but not limited to:

- Authority to Travel forms and Employee Business Expense Statements
- Auto-withdrawal reports, wire transfers and money order requests
- Banking procedures, standards, advisory services, accounts, statements and reconciliations
- Cash control, deposit sheets, cash receipts, cash register, machine tapes and spitter tickets
- Cash handling reports and forms (for example, overage and shortage)
- Cash procedures, standards, advisory services, authorizations and coin processing
- Cemetery property refunds
- Cheque requisitions, stop payment requests, cancellations, reconciliations, tracking, NSF, emergency requests, registers and payment proposals
- Corporate procurement card and other credit card administration
- Cost centre and cost element transactions
- Credit memos, authorizations and payment slips
- Daily registers
- Detailed expenditures
- Disbursements
- Electronic funds transfer (EFT) applications, arrears reporting, forms, refunds, statistics, statements and statistics
- Employee Business Expense Statement template
- Facility booking account receivables and billings
- Fees for service and honorariums
- Flights, vehicle and hotel bookings
- Forms and templates
- Hospitality and entertainment requests and approvals
- Journal vouchers and entries
- Outstanding accounts and write-offs
- Packing slips and receipts of materials
- Payroll deduction applications (for example, bus passes, golf passes)
- Petty cash and point of sale receipts
- Production and refund requests
- Purchase orders
- Rebates, fuel tax and other refunds
- Reconciliations for pass sales at facilities (for example, guest recovery, transit)
- Registrations
- Remittance
- Reports and procedures (for example, annual and year-end financial, consolidated, cumulative, current and capital, GST, yearly, quarterly, monthly, weekly and daily)
- Training payments
- Transactional financial data

Excludes:

- Records and information specific to individual employees - refer to *2022 Human Resources - 070 Employment Records*.

Rules

Retention trigger: Current year

Retention period: 6 years

Based on: [Income Tax Act](#)

Disposition: Destruction

Systems:

Security Class: Restricted

Notes

- N/A

012 Accounting Third Party Invoices

Information related to accounts payable and payment records.

Includes but not limited to:

- Invoice tracking and supporting documents
- Overdue accounts
- Vendor invoices

Excludes:

- N/A

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: SAP

Security Class: Confidential

Notes

- N/A

018 Assessment

Information related to property assessment, valuations and notifications.

Includes but not limited to:

- Appraisals
- Assessment rolls
- Cost approaches
- Data collection
- Defense packages
- Drawings
- Geospatial information
- Property sales
- Property valuation

Excludes:

- N/A

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction
Archives (see notes)

Systems: POSSE
Tax Assessment and Collection System (TACS)

Security Class: Confidential

Notes

- Archives will receive assessment rolls.

020 Budgets

Information related to the compilation, preparation and monitoring of operational budgets and capital budget cost tracking.

Includes but not limited to:

- Adjustments
- Approvals
- Assessments
- Budget (for example, operational budgets for departments, branches, sections, units and programs)
- Contact lists
- Cost tracking
- Facility funding requests, applications and program statements
- Fees and charges
- Financial forecast reports
- Forms and templates
- Meeting agendas, minutes and supporting documents
- Plans, strategies and research
- Priorities
- Procedures, guidelines and process documents
- Profiles
- Proposals
- Questions
- Reports (for example, consolidated, current and capital, cumulative, performance, variance, yearly, quarterly, monthly, weekly and daily reports)
- Service packages
- Submissions
- Supplementary budget adjustments
- Value assessments

Excludes:

- Budgets approved by Council - refer to *2020 Governance - 095 Council and Council Committee Meeting Files*.
- Budgets specific to a project - refer to *2034 Project Management*.

Rules

Retention trigger: Current year

Retention period: 6 years

Based on:

Disposition: Destruction

Systems: Capital and Operating Budget System (COBS)
Google and network drives

Security Class: Restricted

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 6 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 6 years prior to the disposition date

025 General Ledger

Information related to the general ledger or other books of final entry containing summaries of year-to-year transactions of the City.

Includes but not limited to:

- Annual reports
- General ledger

Excludes:

- N/A

Rules

Retention trigger: Permanent

Retention period: Permanent

Based on: [Income Tax Regulations, CRC, c 945, s 5800](#)

Disposition: Permanent

Systems: SAP

Security Class: Confidential

Notes

- Records must be kept for 2 years after the day the corporation dissolves.

030 Grants and Other City Contributions

Information related to grant payments, gifts and other contributions given to external organizations or individuals. The seven different types of possible contributions made externally are donations, grants, rebates, sponsorships, subsidies, loans and investments.

Includes but not limited to:

- Agreements
- Applications
- Authorizations for payments and release of funds
- Close-out processes and year-end reporting
- Design and planning program documents
- Eligibility criteria and assessments
- Gift and contribution requests, authorities and recipient confirmations
- Grant programs
- Objectives/goals and results comparisons
- Procedures, guidelines and process documents
- Program mandates, processes and procedures
- Recipient terms and conditions and compliance monitoring
- Stakeholder reports
- Successful selections and approvals

Excludes:

- Capital grants - refer to *2034 Project Management*.

Rules

Retention trigger: End of program or agreement

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Archives

Systems:

Security Class: Confidential

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

035 Major Asset Disposition

Information related to the sale or exchange and managing the execution of disposition of major City assets. This includes but is not limited to the disposition of Edmonton Power, Edmonton Telephones, Municipal Airport and Drainage Operations.

Includes but not limited to:

- Agreements
- Assessments and appraisals
- Asset inventories
- Disposition plans
- Geospatial information
- Proposals

Excludes:

- N/A

Rules

Retention trigger: End of year asset disposition completed

Retention period: 12 years

Based on:

Disposition: Archives

Systems:

Security Class: Confidential

Notes

- N/A

040 Operating Grants

Information related to operating projects such as capacity-building activities that improve efficiency or effectiveness, municipal services, planning activities and assistance to nonprofit organizations, repairs and maintenance of administration buildings and rehabilitation of capital assets.

Includes but not limited to:

- Annual reports
- Compliance reporting
- Expenditures
- Financial reports
- Grant applications
- Reporting forms

Excludes:

- Capital grants - refer to *2034 Project Management*.

Rules

Retention trigger: End of the year that the program ended

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Archives

Systems: SAP

Security Class: Confidential

Notes

- N/A

050 Payment Card Industry (PCI) Compliance

Information related to locating and protecting credit card data, access control measures and compliance monitoring.

Includes but not limited to:

- Data examinations
- Procedures
- Redaction and deletion requests
- Reports
- Tracking and logs

Excludes:

- N/A

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems:

Security Class: Restricted

Notes

- N/A

060 Tax Recovery

Information related to the tax recovery process.

Includes but not limited to:

- Geospatial information
- Mailouts
- Tax notifications
- Tax sales

Excludes:

- N/A

Rules

Retention trigger: Current year

Retention period: 25 years

Based on: [Municipal Government Act](#)

Disposition: Destruction

Systems:

Security Class: Confidential

Notes

- N/A

065 Investment Management Administration

Information related to the administration of investment funds for the City of Edmonton that are not immediately required for expenditures and direct internal fund management or oversight of external fund managers.

Includes but not limited to:

- Annual reviews or surveys
- Assets
- Bonds
- Capital structure
- Carryforward schedules
- Closures
- Contingency funds
- Contribution and withdrawal policies
- Ed Tel Endowment Fund
- Funding and debt portfolio management
- Interest rates
- Investment principles
- Life variance
- Plan availability
- Reserve funds
- Risk profiles
- Risk reporting
- Securities
- Sinking funds
- Specialized funds
- Trust funds
- Unassigned budget

Excludes:

- Debentures - refer to *2018 Financial Management - 070 Investment Management Program*.
- Disposal of securities - refer to *2018 Financial Management - 070 Investment Management Program*.
- Expenditures - refer to *2018 Financial Management - 070 Investment Management Program*.
- Investment reports and statements - refer to *2018 Financial Management - 070 Investment Management Program*.

Rules

Retention trigger: Maturity of investment (sold, closed or settled)

Retention period: 12 years

Based on: [Income Tax Act](#)
[Municipal Government Act](#)

Disposition: Destruction

Systems: SAP

Security Class: Confidential

Notes

- N/A

070 Investment Management Program

Information related to annual earnings and dividends from City investments that flow into the capital budget and provide additional revenue and diversify the City's revenue base.

Includes but not limited to:

- Annual financial statements
- Annual reports
- Debentures
- Disposal of securities
- Expenditures
- Investment Committee minutes
- Risk management controls
- Statements of compliance

Excludes:

- N/A

Rules

Retention trigger: Permanent

Retention period: Permanent

Based on: [City Policy C212E Investment
Municipal Government Act](#)

Disposition: Permanent

Systems: SAP

Security Class: Confidential

Notes

- N/A

075 Treasury Management

Information related to the corporate oversight of cash handling, financial transactions, accounts payable and receivable, remittance and enforcement processes as well as credit and collections.

Includes but not limited to:

- City bylaws, policy and corporate directives, and procedure research and development
- Legislative and corporate compliance processes
- Procedures, guidelines and process documents
- Transaction volumes monitoring and reporting
- Yearly, quarterly, monthly and manager reports

Excludes:

- Accounts payable transactions - refer to *2018 Financial Management - 010 Accounting*.
- Accounts receivable transactions - refer to *2018 Financial Management - 012 Accounting Third Party Invoices*.

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Financial Administration and Control Directive A1206](#)
[Income Tax Act](#)
[Limitations Act](#)
[Municipal Government Act](#)

Disposition: Destruction

Systems: FINES
 Google and network drives
 SAP

Security Class: Confidential

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

2020 Governance

This function relates to the City of Edmonton's governing mechanisms, including managing, directing and approving strategic frameworks and plans, establishing delegations, bylaws, policies, procedures, standards and best practices and delivery mandated programs and services.



005 Administrative Policies and Policy Tools

Information related to the development, maintenance, review, update and dissemination of administrative policy and policy tools approved by the Executive Leadership Team.

Includes but not limited to:

- Administrative directives
- Administrative policies
- Administrative policy tools, including guidelines, procedures and standards
- Instructions and manuals
- Templates

Excludes:

- N/A

Rules

Retention trigger: Repealed or superceded

Retention period: 12 years

Based on: Business requirements

Disposition: Archives

Systems:

Security Class: Confidential

Notes

- N/A

010 Agency, Board, Committee and Commission Administration

Information related to the administration of agencies, boards, task forces, committees and commissions that are established by City Council bylaw.

Includes but not limited to:

- Procedures, guidelines and process documents (for example. board reporting, establishment, dissolution, meeting management, recognition)
- Scheduling

Excludes:

- Recruitment, appointments, reappointments and member training - refer to 2022 *Human Resource Management*.

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems:

Security Class: Internal

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

015 Agency, Board, Committee and Commission Proceedings

Information related to meetings of agencies, boards, task forces, committees and commissions that are established by City Council bylaw.

Includes but not limited to:

- Applications
- Attendee meeting submissions
- Decisions (quasi-judicial and decision-making committees)
- Descriptions of work
- Establishing documents
- Meeting agendas
- Meeting attendance records
- Meeting minutes and video recordings
- Meeting notices
- Memoranda, Articles of Incorporation and incorporation bylaws
- Memorandums of Understanding and contracted agreements
- Reports
- Resolutions
- Terms of reference

Excludes:

- N/A

Rules - 001 Documentation of Decisions, Actions and Governance

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Archives

Systems:

Security Class: Confidential

Rules - 002 Audio and Video Meeting Recordings

Retention trigger: Current year

Retention period: 3 years

Based on: Business requirements

Disposition: Destruction

Systems:

Security Class: Confidential

Notes

- N/A

020 Assessment Review Board Administration

Information related to managing the Assessment Review Board (ARB). This board has hearings regarding citizens affected by property assessments, business revitalization assessments and local improvement taxes.

Includes but not limited to:

- Board member evaluations
- Contact lists (for example, for Municipal Government Board (MGB) members)
- Correspondence
- External department liaison meetings and advice
- External legal opinions and advice
- Forms and templates (for example, invoice samples)
- Procedures, guidelines and process documents
- Process maps
- Schedules

Excludes:

- 311 scripts, advertising brochures and events - refer to *2006 Communications and Public Relations*.
- Board assignments and chair report - refer to *2022 Human Resource Management - 050 Council, Committees and External Bodies Appointments*.
- Fee reconciliations, MGB invoices and remuneration - refer to *2018 Financial Management - 010 Accounting*.
- Records saved in the board members network drive - refer to *2000 Transitory Information - 005 Transitory Information*.

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: POSSE

Security Class: Restricted

Notes

- Records saved in the board member network drive are considered transitory.
- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

025 Assessment Review Board Hearing Files

Information related to managing the Assessment Review Board (ARB). This quasi-judicial board hears from people who are affected by property assessments, business revitalization assessments and local improvement taxes.

Includes but not limited to:

- Appeals and reviews
- Complaints and case histories
- Correspondence
- Cost hearings
- Court decisions
- Decisions
- Disclosures
- Evidence packages
- Ministerial orders
- Notices (for example, hearings, meetings, notices to appellant and decisions)
- Requests (for example, postponement, withdrawal, preliminary hearings, groupings, costs, audio recordings)

Excludes:

- N/A

Rules - 001 Hearing Files

Retention trigger: Current year

Retention period: 5 years

Based on: [Matters Relating to Assessment Complaints Regulation](#) 15(3)
[Municipal Government Act](#)

Disposition: Destruction

Systems: POSSE

Security Class: Confidential

Rules - 002 Audio and Video Meeting Recordings

Retention trigger: Current year

Retention period: 3 years

Based on: Business requirements

Disposition: Destruction

Systems: Confidential

Notes

- N/A

027 Audits

Information related to the planning, investigating, scheduling, assessing, evaluating, follow-up and reporting on cash audits, area reviews, advice, ethical and performance standard reviews, legal and regulatory compliance reviews, fraud and inappropriate behaviour investigations and system audits.

Includes but not limited to:

- Action plans
- Assessments and evaluations (for example, post-project assessments and evaluations)
- Authorities, policies, standards and guidelines
- Cash handling reviews
- City Auditor's Annual Work Plan
- Closing sheets
- Forms and templates
- Fraud and misconduct hotline reports
- Fraud investigations and reports
- Meeting agendas, minutes and supporting documentation
- Plans, strategies and research
- Procedures, guidelines and process documents
- Recommendations and follow-ups
- Reports (for example, audit and investigation reports)
- Schedules (for example, interview schedules)
- Summaries of observations
- Terms of reference

Excludes:

- Safety audit reports prepared by departments - refer to *2022 Human Resource Management - 090 Occupational Health and Safety*.

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Archives

Systems:

Security Class: Restricted

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

030 Bylaws, Council Policies and Procedures

Information related to City Council's formal governance direction including bylaws and Council-approved policies and procedures.

Includes but not limited to:

- Bylaws, Council policies and procedures
- Drafting instructions and changes
- Municipal development plans (for example, The Ways)
- Procedures
- Research and background

Excludes:

- N/A

Rules - 001 Passed

Retention trigger: Expired, repealed or superseded

Retention period: 25 years

Based on:

Disposition: Archives

Systems:

Security Class: Public

Rules - 002 Defeated

Retention trigger: Bylaw, Council Policy or Council Procedure rejected by Council

Retention period: 2 years

Based on:

Disposition: Archives

Systems:

Security Class: Public

Notes

- N/A

040 Census Administration

Information related to the conduct of the City of Edmonton Municipal Census.

Includes but not limited to:

- Address lists
- Business requirement identification, process diagrams and project plans
- Census worker files (handbooks, rules, coordinator contacts, call back cards)
- Census workers application forms
- Correspondence
- Geospatial information
- Mapping
- Procedures, guidelines and process documents
- Question development
- Staff and technology planning

Excludes:

- Census worker and other training - refer to *2022 Human Resource Management - 190 Training*.
- Communication plans - refer to *2006 Communications and Public Relations - 040 Marketing and Promotions*.

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: Three census cycles
[Limitations Act](#)

Disposition: Destruction

Systems:

Security Class: Confidential

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

045 Census Results and Reports

Information related to results and reports from the City of Edmonton Municipal Census.

Includes but not limited to:

- Final reports
- Geospatial information
- Maps
- Population statistics and results

Excludes:

- N/A

Rules

Retention trigger: Permanent

Retention period: Permanent

Based on:

Disposition: Permanent

Systems:

Security Class: Restricted

Notes

- N/A

050 Community Standards Licence Appeal Committee Administration

Information related to managing the Community Standards and Licence Appeal Committee (CSLAC).

Includes but not limited to:

- Agendas
- External legal opinions and advice
- Notices (for example, hearings, meetings or decision notices, notices to appellant)
- Procedures, guidelines and process documents
- Process maps and instructions
- Schedules and scheduling

Excludes:

- N/A

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems:

Security Class: Restricted

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

055 Community Standards Licence Appeal Committee Meeting Files

Information related to managing the quasi-judicial Community Standards and Licence Appeal Committee (CSLAC).

Includes but not limited to:

- Appeals and reviews
- Case histories
- Minutes

Excludes:

- N/A

Rules - 001 Meeting Files

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems:

Security Class: Confidential

Rules - 002 Audio and Video Meeting Recordings

Retention trigger: Current year

Retention period: 3 years

Based on: Business requirements

Disposition: Destruction

Systems:

Security Class: Confidential

Notes

- N/A

060 Corporate Culture and Engagement

Information related to administering the employee engagement and diversity program and the corporate Culture Ambassador program. These programs may be coordinated at a corporate, department, branch, section or unit level.

Includes but not limited to:

- Activities, outlines and yearly activity plans
- Communications plans and tools
- Contact lists
- Current member, past member and succession lists
- Employee engagement and diversity survey
- Employee engagement survey action plans
- Flexible working environment
- Group leader (cohort) information
- Meeting agendas, minutes and supporting documentation
- Orientations and orientation schedules
- Photos, videos and completed consent forms
- Plans, strategies and research
- Presentations
- Procedures, guidelines and process documents
- Reports
- Results and presentations (including those for department, branch or section)
- Sample activities
- Schedules
- Surveys
- Terms of reference
- Trade show planning

Excludes:

- N/A

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Archives

Systems: Google Drive

Security Class: Confidential

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

080 Corporate Initiatives

Information related to the development and delivery of corporate-wide programs, services and initiatives with no definitive start and end date, usually mandated by the Executive Leadership Team (ELT).

Includes but not limited to:

- Business cases, models and plans
- Committee and advisory group meeting agendas, minutes and action items
- Implementation and action plans
- Research (for example, industry scans or jurisdictional scans)
- Resource allocations
- Strategies and development (for example, impact assessments, evaluations, surveys)
- Terms of reference

Excludes:

- Projects that have a) definitive start and end dates and b) a formalized project management methodology - refer to *2034 Project Management - 010 Corporate Projects*.

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)
Business requirements

Disposition: Archives

Systems:

Security Class: Confidential

Notes

- N/A

090 Council and Standing Committee Administration

Information related to preparing, planning and conducting activities for Council and Council committees.

Includes but not limited to:

- Calendars
- Information session provisions
- Procedures, guidelines and process documents (for example, agendas, board reporting, meeting management documents, reappointment and recruitment processes)
- Requests to speak
- Schedules
- Seating charts
- Terms for Deputy Mayor
- Training, orientations and handbooks

Excludes:

- 311 scripts, municipal correspondence, advertising and web materials - refer to *2006 Communications and Public Relations*.

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems:

Security Class: Internal

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

095 Council and Standing Committee Meeting Files

Information related to the proceedings of Council and Standing Committees.

Includes but not limited to:

- Agendas
- In-private meeting attendees and reasons for attendance
- Information session provisions
- Lists of speakers
- Member attendance lists
- Minutes
- Presentations and other information provided
- Reports
- Requests to speak
- Schedules
- Voting records

Excludes:

- N/A

Rules - 001 Meeting Files

Retention trigger: Permanent

Retention period: Permanent

Based on: [Municipal Government Act](#)

Disposition: Permanent

Systems: eScribe
paper files

Security Class: Restricted

Rules - 002 Video Recordings of Meetings

Retention trigger: Current year

Retention period: 12 years

Based on: Business requirements

Disposition: Destruction

Systems: Open Data

Security Class: Restricted

Notes

- The official version is in paper format.
- Information in eScribe is considered a duplicate once the video has been preserved in Open Data.

100 Council Gifts and Honoraria

Information related to gifts and honoraria provided to council members. This includes any item or benefit provided to a Member of Council without payment of consideration or a reciprocal obligation from the Council member, as per [Council Code of Conduct Bylaw 18483, Schedule A, Part L](#).

Information includes but is not limited to:

- Annual statement of disclosure for gifts and honoraria
- Supporting documents

Excludes:

- N/A

Rules

Retention trigger: Current Year

Retention period: 12 years

Based on: [Council Code of Conduct Bylaw 18483, Schedule A, Part L](#)
[Municipal Government Act](#)

Disposition: Archives

Systems:

Security Class: Public

Notes

- N/A

110 Council Initiatives

Information related to the development and delivery of Council initiatives and related programs.

Includes but not limited to:

- Action plans
- Advice and consultation
- Assessments and evaluations
- Budget monitoring and planning
- Business cases
- City Council sponsors
- Contact lists
- Goals and objectives
- Mandates, plans, strategies and research (for example, those related to implementation, roll-out, improvement services. terms of reference and value management)
- Meeting agendas, minutes and supporting documentation
- Performance measures
- Procedures, guidelines and process documents
- Reports (for example, status reports)
- Supporting department and lead staff
- Terms of reference

Excludes:

- N/A

Rules

Retention trigger: End of initiative

Retention period: 12 years

Based on:

Disposition: Archives

Systems:

Security Class: Internal

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

120 Council Relations

Information related to the relationships between departments and Council. These communications are usually routed through City Council, the City Clerk or the Deputy City Managers to business areas for response.

Includes but not limited to:

- Action items
- Advisement communications
- Contact lists
- Council inquiries and responses
- Council memos
- Council orientation
- Council report preparations

Excludes:

- Feedback or inquiries related to a service, project or program or the performance of a task by a department, branch or section - refer to *2006 Communications and Public Relations - 030 Feedback and Inquiries*.
- Official Council Reports - refer to *2020 Governance - 090 Council and Standing Committee Meeting Files*.

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems:

Security Class: Confidential

Notes

- N/A

130 Delegation of Authority

Information related to the delegation of authority and powers to staff.

Includes but not limited to:

- Appointments and acting assignments
- Appointments and oaths
- Delegation charts
- Employee delegations

Excludes:

- N/A

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Archives

Systems:

Security Class: Internal

Notes

- N/A

140 Election Administration

Information related to the conduct of the elections and by-elections of the municipality, the public school board and the Catholic school board.

Includes but not limited to:

- Auditors comments and responses
- Business requirement documentation (including that related to logistics, hiring, testing, technology, communications, voting stations)
- Decision logs
- Election worker applications
- Forms
- Geospatial information
- Processes (for example, processes for advance votes, at home votes, by-elections, conduct of elections for other local authorities, election day, institutions, nomination day, special ballots and votes on a question)
- Project budgets, debriefs and reviews
- Reporting to the Election Commissioner
- Research and planning
- Testing (for example, new election and IT process testing)
- Voting station locations and supply lists
- Ward coordination
- Ward maps (see - 002 below)

Excludes:

- Contracts - refer to *2032 Materials, Services and Equipment Management - 030 Procurement and Contract Management*.
- Election worker training - refer to *2022 Human Resource Management - 190 Training*.

Rules - 001 Election Administration Materials

Retention trigger: End of the election year

Retention period: 12 years

Based on: [Limitations Act](#)
[Local Authorities Election Act](#)

Disposition: Destruction

Systems: Election Logistics Management System (ELMS), Google Drive

Security Class: Confidential

Rules - 002 Ward Maps

Retention trigger: End of the election year

Retention period: 12 years

Based on: [Limitations Act](#)
[Local Authorities Election Act](#)

Disposition: Archives

Systems: ARC GIS

Security Class: Public

Notes

- N/A

142 Election Ballot Account, Nomination Forms and Materials

Information related to material pertaining to a candidate's eligibility, the validity of election results for elections and by-elections, and all voting materials prescribed for use in the local elections and by-elections of the municipality and the public and Catholic school boards, including the permanent electors register.

Includes but not limited to:

- Ballot account and recount forms
- Candidate nominations
- Nomination forms
- Marked and unmarked ballots
- Voting statements
- Official results
- Official statement of election results
- Permanent electors register

Excludes:

- N/A

Rules - 001 Ballot Account, Recount and Candidate Nomination Forms

Retention trigger: Election or by-election day

Retention period: 4 years, 3 months

Based on: [Local Authorities Election Act](#), s 28(5), s 100(1.1)
Next swearing in ceremony

Disposition: Destruction

Systems: Election Logistics Management System (ELMS) - VoterView
Physical records

Security Class: Public

Rules - 002 Permanent Electors Register

Retention trigger: Election or by-election day

Retention period: Permanent

Based on: [Local Authorities Election Act, RSA 2000, c L-21, s 49](#)

Disposition: Permanent

Systems: Election Logistics Management System (ELMS) - VoterView

Security Class: Confidential

Rules - 003 Voting Materials

Retention trigger: Election or by-election day

Retention period: 12 weeks

Based on: [Local Authorities Election Act](#), s 93, s 101

Disposition: Destruction

Systems: Election Logistics Management System (ELMS) - VoterView, Google Drive

Security Class: Confidential

Rules - 004 Official Statement of Election Results

Retention trigger: Election or by-election day

Retention period: Permanent

Based on: [Local Authorities Election Act, RSA 2000, c L-21, s 97](#)

Disposition: Permanent

Systems: Physical records, Google Drive

Security Class: Public

Notes

- Archives will receive sample ballots.

144 Political Participant Registration and Election Financial Reporting

Information related to the registration and financial reporting for candidates, local political parties, slates of candidates and third parties for elections and by-elections of the municipality, the public school division and the separate school division.

Includes but not limited to:

- Campaign disclosure statements
- Candidate notices of intent
- Third party election advertising contribution reports and advertising returns

Excludes:

- N/A

Rules - 001 Campaign Disclosure Statements and Third-party Election Advertising Contribution Reports and Returns

Retention trigger: Current year

Retention period: Permanent

Based on: [Limitations Act](#)
[Local Authorities Election Act](#), s 147.4 (7), s 182(6)
[Local Political Parties and Slates Regulation](#) 22(6)

Disposition: Permanent

Systems: Physical records, Google Drive, Open Data

Security Class: Confidential

Rules - 002 Local Political Party and Third-party Registration Records

Retention trigger: Registration cancelled

Retention period: 12 years

Based on: [Limitations Act](#)
[Local Authorities Election Act](#), RSA 2000, c L-21, s 180
[Local Authorities Election Act](#), RSA 2000, c L-21, s 163
[Local Political Parties and Slates Regulation](#), AR 170/2024, s. 5

Disposition: Destruction

Systems: Physical records, Google Drive

Security Class: Confidential

Rules - 003 Slate of Candidate Registrations, Candidate Notices of Intent

Retention trigger: End of campaign period

Retention period: 12 years

Based on: [Limitations Act](#)
[Local Political Parties and Slates Regulation](#), AR 170/2024, s. 7

Disposition: Destruction

Systems: Physical records, Google Drive

Security Class: Confidential

Notes

- N/A

148 Environmental Management

Information related to compliance with relevant environmental legislation and regulations including *ISO 14001:2015 Environmental management systems: Requirements with guidance for use* and City environmental programs such as the ENVISO program. It also includes information on the prevention of pollution and continually improving environmental performance.

Includes but not limited to:

- Assessments
- Audit reports and checklists
- Audits
- Corrective and preventive action reports
- ENVISO management review
- ENVISO monitoring, measuring, procedures, registry and releases
- Forms and templates
- Geospatial information
- Procedures, guidelines and process documents
- Review schedules
- Statements of scope, policy, objectives and targets
- System overviews
- System supplements

Excludes:

- Bulletins, newsletters, logos and other promotional material - refer to *2006 Communications and Public Relations*.
- Training - refer to *2022 Human Resource Management - 190 Training*.

Rules

Retention trigger: Current year

Retention period: 25 years

Based on: [Limitations Act](#)

Disposition: Archives

Systems:

Security Class: Confidential

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 25 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 25 years prior to the disposition date.

150 Intergovernmental and External Relations

Information related to advocacy, communication, collaboration and relationship building with other municipal, provincial and federal levels of government, external organizations and international and community partners.

Includes but not limited to:

- Accountability measures
- Advocacy
- Announcements
- Best practices
- Cabinet appointments
- Collaboration
- Communications and engagement
- Contact lists (for example, contact lists for Members of Parliament, Deputy Ministers and Members of the Legislative Assembly)
- Frameworks (for example, Regional Evaluation Framework (REF))
- Goals and objectives
- Intergovernmental agreements
- Legislation and policy input
- Meeting agendas, minutes and supporting documentation
- Memorandums of Agreement
- Models
- Partnerships
- Plans, strategies and research
- Priorities
- Procedures, guidelines and process documents
- Proposals
- Protocols
- Recommendations
- Reports and statistics
- Situational awareness documents (for example, briefing notes, briefs)
- Tracking
- Visits

Excludes:

- N/A

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Archives

Systems:

Security Class: Confidential

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

160 Organizational Meetings

Information related to meetings with leadership teams, departments, branches, sections and cross-department or cross-branch management, including Executive Leadership Team (ELT) meetings.

Includes but not limited to:

- Action items
- Decisions
- Forms and templates
- Meeting agendas, minutes and supporting documentation
- Procedures, guidelines and process documents
- Reports
- Schedules

Excludes:

- N/A

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)
Business requirements

Disposition: Archives

Systems:

Security Class: Restricted

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

170 Organizational Reports

Information related to the reporting of operational details that reflect current activity and intended to provide information to decision makers within the City. This may include, but is not limited to, reports from departments, branches, sections and business units and brief accounts or statements communicating news or events issued for the information of City staff.

Includes but not limited to:

- Briefs and notes
- Reports
- Reviews and approvals
- Situational reports (SitRep)
- Status updates
- Templates (for example, email signature, letterhead, memo and presentation templates)

Excludes:

- N/A

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: Business requirements

Disposition: Archives

Systems:

Security Class: Confidential

Notes

- N/A

180 Organizational Structure

Information related to the organization of the corporate reporting structure and the relationship between job positions.

Includes but not limited to:

- Contact lists
- Organizational charts
- Proposals and planning for organizational change

Excludes:

- Records specific to individual employment - *2022 Human Resource Management - 070 Employment Records.*

Rules

Retention trigger: Current year

Retention period: 6 years

Based on: Business requirements

Disposition: Archives

Systems:

Security Class: Confidential

Notes

- N/A

190 Petitions

Information related to petitions presented to the City requesting a vote on a particular matter and working copies made from these petitions. This includes petitions to establish or disband a Business Revitalization Zone.

Includes but not limited to:

- Annotations
- Declarations of sufficiency or insufficiency
- Final reports
- Petitions (including original and copies of petitions with decision notations)
- Procedures, guidelines and process documents
- Rejection codes

Excludes:

- Petition worker training - refer to *2022 Human Resource Management - 190 Training*.
- Staff support requests - refer to *2022 Human Resource Management - 170 Staff Support Administration*.

Rules

Retention trigger: No longer valid

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Archives

Systems:

Security Class: Confidential

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

195 Quality Management System

Information related to compliance quality management systems including but not limited to *ISO 9001:2015 Quality management systems - Requirements*, which lays out the international best practices for maintaining superior products and services with commitment to continual improvement, compliance to regulations and customer satisfaction.

Includes but not limited to:

- Audits by independent outside organizations
- Corrective actions
- Inspections
- Preventative actions
- Repair

Excludes:

- Environment management - refer to *2020 Governance - 148 Environment Management*.
- Training - refer to *2022 Human Resource Management - 190 Training*.

Rules

Retention trigger: Current year

Retention period: 25 years

Based on: [Limitations Act](#)

Disposition: Archives

Systems:

Security Class: Confidential

Notes

- N/A

200 Strategic Planning

Information related to investigating, analyzing and reporting on issues, trends and best practices that may impact corporate and regional strategies and initiatives. This series includes municipal, corporate, department, branch, section and business area planning and strategies for implementation.

Includes but not limited to:

- Action plans
- Benchmarks, measures, outcomes and targets
- Business or operational plans, visions and forecasts
- Business process diagrams and models
- Contact lists
- Development plans
- Framework direction and approvals
- Meeting agendas, minutes and supporting documents
- Mission statements
- Municipal directional plans
- Official strategic plans
- Performance measures
- Plans, strategies and research
- Reports (for example, consultation reports)

Excludes:

- N/A

Rules

Retention trigger: Current year or plan expiry date

Retention period: 25 years

Based on: Business requirements

Disposition: Destruction

Systems:

Security Class: Internal

Notes

- Some plans can span numerous years, so will need to be reviewed to determine the correct disposition date.

210 Subdivision Development Appeal Board Administration

Information related to managing the Subdivision Development and Appeal Board (SDAB). This quasi-judicial board hears appeals relating to decisions or enforcement orders issued by the Development Authority and subdivision application decisions issued by the Subdivision Authority. The SDAB is governed by *Subdivision and Development Appeal Board Bylaw 18307*.

Includes but not limited to:

- Agendas
- Appeals and reviews
- Contact lists (for example, Municipal Government Board members)
- Correspondence (for example, with agents, Municipal Governance Board, notes to file, municipalities and public)
- Disclosures
- Evaluations
- Evidence packages
- External department liaison meetings and advice
- Geospatial information
- Ministerial orders
- Notices (for example, hearing, meeting and decision notices, notices to the appellant)
- Procedures, guidelines and process documents
- Process maps and instructions
- Schedules and scheduling
- Waivers and withdrawals

Excludes:

- 311 scripts, advertising, brochures and events - refer to *2006 Communications and Public Relations*.
- Fee reconciliations, MGB invoices and remuneration - refer to *2018 Financial Management - 010 Accounting*.
- Member recruitment - refer to *2022 Human Resource Management - 050 Council, Committee and External Body Appointments*.
- Municipal correspondence - refer to *2020 Governance - 150 Intergovernmental and External Relations*.

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: Google and network drives,
POSSE

Security Class: Confidential

Notes

- Audio and video recordings of meetings are retained for 3 years.
- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

215 Subdivision Development Appeal Board Decisions

Information related to decisions made by the Subdivision Development and Appeal Board (SDAB). This quasi-judicial board hears appeals relating to decisions or enforcement orders issued by the Development Authority and subdivision application decisions issued by the Subdivision Authority. The SDAB is governed by *Subdivision and Development Appeal Board Bylaw 18307*.

Includes but not limited to:

- Court of Appeal decisions
- SDAB decisions

Excludes:

- N/A

Rules

Retention trigger: Permanent

Retention period: Permanent

Based on:

Disposition: Permanent

Systems: POSSE

Security Class: Public

Notes

- Complete records are available in paper format pre-2021.
- Complete records are stored in POSSE effective January 2021.

2022 Human Resource Management

This function relates to programs, services, and processes for managing human resources according to acts, regulations and collective agreements, including recruiting, training, planning and compensating.



010 Benefits, Payroll and Pension Programs

Information related to administering and managing programs offered by Employee Services, including benefits, payroll and pension.

Includes but not limited to:

- Administrative guidelines
- Automated time passing system documentation (for example, generic systems information, history of decisions)
- Benefit programs procedures, reports, information for members (for example, those for credit, life insurance, over-age dependents and pensioners programs)
- Change in benefit premiums
- Cheque distribution lists
- Procedures, guidelines and processing documents
- Program packages (for example, those for sign-on, maternity leave and life changes)
- Reconciliations (for example, those for medical, dental, travel, HCSA and life insurance)
- Reports (for example, off-cycle, pension exceptions, affirmation letter, cost of living adjustment, mass retroactive payment reports)
- Sick or ill claim reporting (for example, long term disability, sick, Workers' Compensation Board (WCB) benefit reporting)
- Termination of benefits reporting
- Union reviews

Excludes:

- Individual employee benefit information - refer to *2022 Human Resource Management - 074 Benefit, Payroll and Pension Records*.

Rules

Retention trigger: Superseded or obsolete

Retention period: 12 years

Based on: Business requirements

Disposition: Destruction

Systems: Google Drive

Security Class: Confidential

Notes

- N/A

020 Compensation and Position Management

Information related to the compensation, classification and position management for the City of Edmonton.

Includes but not limited to:

- Administration and tracking sheets
- Analysis
- Assessments and critical position assessments
- Classification determination forms
- Classification/reclassification request forms
- Comparative job descriptions
- Compensation surveys and reports
- Disputes
- Job profiles
- Plans, strategies and research
- Position descriptions
- Position numbers
- Position tracking and reconciliations
- Procedures, guidelines and process documents
- Reclassifications and appeals
- Reconciliations
- Reports
- Requests and approvals
- Salary increases
- Salary surveys
- Union and management position descriptions
- Union specifications
- Vacancies

Excludes:

- Individual employee information - refer to *2022 Human Resource Management - 070 Employment Records*.

Rules

Retention trigger: File closed or obsolete

Retention period: 12 years

Based on: [Alberta Rules of Court](#), s 3
[Limitations Act](#)

Disposition: Destruction

Systems: Google Drive

Security Class: Confidential

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

030 Collective Agreements and Bargaining

Information related to collective agreements between the City of Edmonton and its various employee unions and associations.

Includes but not limited to:

- Agreements
- Bargaining meeting agendas, minutes and notes
- Interpretations
- Policy grievances
- Procedures, guidelines and process documents
- Specifications
- Templates and samples

Excludes:

- Individual employee information - refer to *2022 Human Resource Management - 070 Employment Records*.
- Individual and group grievances - refer to *2022 Human Resource Management - 040 Labour Relations*.

Rules

Retention trigger: Permanent

Retention period: Permanent

Based on: Business requirements

Disposition: Permanent

Systems: Google Drive

Security Class: Confidential

Notes

- N/A

040 Labour Relations

Information related to administering the labour relations programs for the City of Edmonton. This includes processing and resolving performance management cases, collective agreement disputes or human resource complaints.

Includes but not limited to:

- Arbitration decisions
- Attendance management, discipline investigation reports and recommendations
- Communications with union representatives
- Complaints
- Disputes
- Individual and group grievances
- Interviews
- Investigations and reports
- Legal opinions
- Mediations
- Resolutions
- Settlement strategies and resolutions
- Statements

Excludes:

- Classification and compensation disputes - refer to *2022 Human Resource Management - 020 Compensation and Position Management*.
- Individual employee information - refer to *2022 Human Resource Management - 070 Employment Records*.
- Policy grievances - refer to *2022 Human Resource Management - 030 Collective Agreements and Bargaining*.

Rules

Retention trigger: Resolution of dispute or complaint

Retention period: 12 years

Based on: [Alberta Rules of Court](#), s 3
[Limitations Act](#)

Disposition: Destruction

Systems: Google Drive

Security Class: Restricted

Notes

- N/A

050 Council, Committee and External Body Appointments

Information related to managing member appointments for agencies, boards, task forces, committees, commissions and other external bodies that are established by City Council by bylaw.

Includes but not limited to:

- Annual chair reports
- Appointment reports
- Appointments (for example, those of citizen-at-large, council, administration, external nominations and self-selecting)
- Member recruitment, applications, interviews and profiles
- Procedures, guidelines and process documents (for example, those relating to appointment, reappointment and recruitment)
- Recruitment strategies and plans
- Successful applications (for example, reference letters, test results)

Excludes:

- Advertising campaigns and web material - refer to *2006 Communications and Public Relations*.

Rules - 001 Appointments

Retention trigger: Current year

Retention period: 12 years

Based on:

Disposition: Destruction

Systems:

Security Class: Restricted

Rules - 002 Documents Submitted by Unsuccessful Applicants

Retention trigger: End of year of the unsuccessful application

Retention period: 1 year

Based on: [Access to Information Act](#), [Protection of Privacy Act](#)

Disposition: Destruction

Systems:

Security Class: Restricted

Notes

- N/A

060 Disability and Medical Management

Information related to employees that are paid by the City, including paid work experience students, related to managing and administering disability and medical.

Includes but not limited to:

- Claim forms and waivers (for example, those for short term disability, long term disability, Workers' Compensation Board (WCB) and supplementary income replacement)
- Confirmation of and changes to employment positions
- Correspondence with and reporting to the WCB (including wage transfers, appeals, statements of accounts and all other mandatory reporting)
- Declaration of dependents (for example, dependents over 18)
- Duty to Accommodate assessments, recommendations, return to work planning, disability claims
- Employee Ergonomic Assessments, reports, memos, emails
- Exposure to asbestos, contagions, silica or other incident reports
- Grievances and appeals
- Hygiene testing and monitoring reports (for example, those relating to asbestosis or silicosis)
- Incident Investigation Data Collection Forms
- Incident reports for work-related incidents, blood or bodily fluid exposure
- Medical assessments and testing
- Noise level, audiometric and pulmonary function tests and WCB requests for results
- Occupational health and safety injury or accident reports
- Pre-placement medical results
- Records of return to work
- Respiratory fit-test results
- WCB investigations and reporting

Excludes:

- For volunteers, unpaid work experience and practicum students, refer to *2022 Human Resource Management - 200 Volunteers*.

Rules - 001 Primary Employee File

Retention trigger: Claim satisfied

Retention period: 30 years

Based on: [Occupational Health and Safety Code, Alta Reg 191/2021](#), s 40(4)

Disposition: Destruction

Systems: Cority System
Google Drive
Medgate
Network drives

Security Class: Restricted

Rules - 002 Business Area Copies

Retention trigger: Current year

Retention period: 2 years

Based on: Business requirements

Disposition: Destruction

Systems: Google and network drives

Security Class: Restricted

Notes

- Naming Convention: Employee last name First name Position

070 Employment Records

Information related to the employment history of all current and former employees, as well as board, committee and Council members.

Includes but not limited to:

- Allowances not subject to pension (for example, equipment or supply allowances)
- Approved job descriptions (reclassification)
- Canada Revenue Agency (CRA) inquiries
- Commercial driver abstracts
- Employee personal and contact information
- Equipment or items checklists (for example, checklists for keys, cards, tools, keypunch)
- Learning and development plans
- Offer letters (pre-2007)
- Performance appraisals, commendations, evaluations, personal contribution plans and recognition
- Post-training reports
- Power of attorney
- Returned items forms
- Subpoenas (for example, those for jury duty, witness)
- Training and education records

Excludes:

- Application and hardware passwords and security specific to an employee - refer to *2026 Information Technology Management - 012 Application and Hardware Support*.
- Payroll deductions including bus passes, golf passes and recreation memberships - refer to *2018 Financial Management - 010 Accounting*.
- Volunteers, unpaid work experience and practicum students - refer to *2022 Human Resource Management - 200 Volunteers*.

Rules - 001 Primary Employee File

Retention trigger: Termination date

Retention period: 12 years

Based on: [Alberta Rules of Court](#), s 3
[Canada Labour Standards Regulations, s 24\(1\)](#)
[Employment Standards Code](#)
[Limitations Act](#)

Disposition: Destruction

Systems: CACTIS (Transit Driver Complaints and Commendations)
 Daily Electronic Time Sheets (DETS)
 Google Drive
 Network drives
 PeopleSoft
 SAP

Security Class: Restricted

Rules - 002 Business Area Employee Administration

Records not required by the Human Resources official employee file, but which relate to the management of employees by business areas.

Includes but is not limited to:

- Coaching, mentoring or setting expectations communications
- Learning plans

Retention trigger: Current year

Retention period: 2 years

Based on: Business requirements

Disposition: Destruction

Systems: Google and network drives

Security Class: Restricted

Notes

- The records in this series are irrelevant to pension calculations.
- All sensitive personal assessments, including diversity, psychometric and Lynda.com assessments, must NOT be kept by the City. All such assessments are provided directly to the employee only.
- Naming convention: Employee last name First name Position

074 Benefits, Payroll and Pension Records

Information related to administering benefits, payroll and pension for current and former employees, as well as board, committee and Council members.

Includes but not limited to:

- Active membership start and cease date
- Allowances subject to pension (for example, service pay allowance)
- Approved time reports and paid compensation
- Audits
- Benefit entitlements
- Cessation of active membership
- Councillor payroll administration
- Deductions (tax, benefit, pension, charitable, optional)
- Designated beneficiary
- Fund transfers and payment or transfer date
- Leaves (including self-funded, maternity and bereavement)
- Member election of payment option (current or former member)
- Name of member or former member
- Offer letters (for example, those for home position, secondments, acting and relieving)
- Payouts (for example, pension, vacation, banked time payouts)
- Pension enrollment forms
- Reimbursements (for example, safety equipment and mileage reimbursement) and related documentation
- Retirement and termination forms
- Retroactive pay documentation
- T4s, T4As and other year-end reporting slips

Excludes:

- N/A

Rules - 001 City-administered Pension Plans (see notes)

Retention trigger: Pension payment (benefits) paid out in full

Retention period: 7 years

Based on: [Employment Pension Plans Act](#)
[Employment Pension Plans Regulation](#)
[Public Sector Pension Plans Act](#)

Disposition: Destruction

Systems: Google Drive
 PeopleSoft

Security Class: Restricted

Rules - 002 Non-City-administered Pension Plans

Retention trigger: Employee termination

Retention period: 25 years

Based on: [Employment Pension Plans Act](#)

[Employment Pension Plans Regulation](#)
[Public Sector Pension Plans Act](#)

Disposition: Destruction

Systems: Google Drive
PeopleSoft

Security Class: Restricted

Notes

- The records in this record series are relevant to pension calculations
- City-administered plans include the Fire Chiefs' Pension Plan (FCSP), the Fire Fighters' Supplemental Pension Plan (FFSP), the City's Annuity Fund (pre-1967) and the Police Supplementary Pension Fund (pre-1967).
- Non-City-administered plans include the Local Authorities Pension Plan (LAPP) and the Special Forces Pension Plan (SFPP).
- The "Pension payment (benefits) paid out in full" trigger includes payments made to spouses and dependents of deceased employees.
- Official records pre-1997 are kept in paper form.

080 Employment Programs

Information related to managing and administering employment programs for the City of Edmonton. Programs may include Diversity and Inclusion, Health and Wellness, Recognition, Duty to Accommodate, performance management, talent planning and career planning.

Includes but not limited to:

- Administrative guidelines
- Assessments, memos, attachments
- Awards (for example, achievement, decorations, commendations and honorary awards)
- Counselling and mentoring
- Employment standards applications
- Event dates, schedules and locations
- Forms and templates
- Health and Wellness programs (for example, audiometric testing, bodily fluid and blood, Celebrating our Faith, meditation, prayers for Council, pulmonary function testing, respirator fit testing and walk the stairs programs)
- Long service and perfect attendance reports
- Medical procedures (for example, drivers, pesticides and trunk line procedures)
- Nomination submissions and letters
- Nursing reporting processes
- Photos, videos and completed consent forms
- Plans, strategies and research
- Procedures, guidelines and process documents (for example, Benefits at a Glance, Death in Service, Death of Dependent and ergonomic tip sheets)
- Process documentation
- Resources for supervisors
- Tracking
- Training handbooks

Excludes:

- Individual employee benefit information - refer to *2022 Human Resource Management - 074 Benefits, Payroll and Pension Records*.
- Workforce planning - refer to *2020 Governance - 200 Strategic Planning*.

Rules

Retention trigger: Program component revised or discontinued

Retention period: 12 years

Based on: Business requirements

Disposition: Destruction

Systems: Daily Electronic Time Sheets (DETS)
Google Drive
PeopleSoft

Security Class: Internal

Notes

- N/A

085 Benefits, Payroll and Pension Planning

Information related to the critical research, documentation and planning that build the core of the benefits, payroll and pension programs in the City and that is used for business continuity.

Includes but not limited to:

- Actuarial valuation reports
- Amendments and restates
- Audited financial statements
- Change in group research (for example, Councillor Group)
- Change in pension legislation
- Fundholder contracts or trust agreements
- Funding agreements
- Historical documentation relevant to specific member groups
- Investment, funding and governance policies
- Notices of costs
- Original plan
- Partnerships
- Pass off files
- Pension pay close balancing reports
- Policy statements and manuals
- Premium changes
- Research
- Strategies

Excludes:

- Individual employee benefit information - refer to *2022 Human Resource Management - 074 Benefits, Payroll and Pension Records*.

Rules

Retention trigger: Termination of plan

Retention period: 25 years

Based on: Business requirements

Disposition: Destruction

Systems: Google Drive

Security Class: Restricted

Notes

- N/A

090 Occupational Health and Safety

Information related to administering the Occupational Health and Safety Program.

Includes but not limited to:

- Activity resources (for example, pictures, videos, brochures, presentations and templates)
- Analysis tools, equipment, methodology, calibration information
- Branch report cards
- Contact lists (for example, First Aid Responders, Fire Wardens, Emergency Responder contact lists)
- Critical incident stress management
- Forms and templates
- Hazard Assessments
- Incident reporting and counselling processes
- Meeting agendas, minutes and supporting documents
- Plans, strategies and research
- Procedures, standards, guidelines and process documents (for example, those relating to Confined Space Entry, Working Alone)
- Programs (for example, prime contractor and working alone programs)
- Safety audit reports
- Safety orientation checklists, training requirements and attendance lists
- Security Mobile Guard Response Forms
- Workplace safety inspections, office safety review schedules, assessments, evaluations, follow-up and reports

Excludes:

- Incidents involving the public - refer to *2030 Legal Services - 020 Public Incident Reporting*.
- Individual employee information - refer to *2022 Human Resource Management - 070 Employment Records*.
- Individual employee medical information - refer to *2022 Human Resource Management - 060 Disability and Medical Management*.
- Safety Data Sheets (SDS) - refer to *2032 Materials, Services and Equipment Management - 046 Safety Data Sheets*.

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Alberta Rules of Court](#), s 3
[Limitations Act](#)
[Occupational Health and Safety Act, SA 2020, c O-2.2](#)
[Occupational Health and Safety Code, Alta Reg 191/2021](#)

Disposition: Destruction

Systems: Google Drive
 PeopleSoft
 Safety Data Management

Security Class: Confidential

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

110 Onboarding and Offboarding

Information related to staff moves, changes, onboarding, retirements, terminations and offboarding.

Includes but not limited to:

- Booklets and handouts
- Contact lists
- Exit interview questions
- Forms and templates (for example, orientation checklists and those related to facility mentorship programs, retirement, returned items and termination)
- Meeting agendas, minutes and supporting documentation
- New employment checklists
- Plans, strategies and research
- Presentations and new employee information packages
- Procedures, guidelines and process documents (for example, Employee Resource Guide)
- Programs
- Remedy tickets and telecom requests
- Reports
- Welcome messages and guides

Excludes:

- Individual employee information and completed forms, refer to *2022 Human Resource Management - 070 Employment Records*.

Rules

Retention trigger: Current year

Retention period: 6 years

Based on: Business requirements

Disposition: Destruction

Systems: Google Drive
PeopleSoft

Security Class: Confidential

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 6 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 6 years prior to the disposition date

160 Recruitment

Information related to recruiting new employees and recruitment events for employees hired through the City of Edmonton recruitment process.

Includes but not limited to:

- Applicant profile
- Applications and resumes
- Candidate testing templates
- Contact lists
- Events
- Extension letters
- Forms (For example, EMP5397 Canada Summer Jobs - Employer and Employee Declaration)
- Government reporting
- Grievances
- Interview plans and questions
- Job postings, qualifications and pre-screening questions
- Pamphlets and handouts
- Plans, strategies and research
- Presentations and videos
- Procedures, guidelines and process documents
- Program documentation and listings
- Requisitions and attachments
- Reports
- System metadata and in-system data fields, including but not limited to application date, the step and status of the application, and application source, source name and source type.

Excludes:

- Grant applications - refer to *2018 Financial Management - 030 Grants and Other City Contributions*.
- Projects - refer to *2034 Project Management*.
- Successful recruitment specific to an individual employee - refer to *2022 Human Resource Management - 070 Employment Records*.

Rules - 001 Recruitment

Retention trigger: Current year of recruitment completion or requisition close

Retention period: 12 years

Based on: Business requirements

Disposition: Destruction

Systems: Taleo, Google Drive, Google Cloud Platform

Security Class: Restricted

Rules - 002 Information Submitted by Unsuccessful Applicants

Retention trigger: End of year of the unsuccessful application

Retention period: 1 year

Based on: Business requirements
[Access to Information Act](#), [Protection of Privacy Act](#)

Disposition: Destruction

Systems: Taleo

Security Class: Restricted

Rules - 003 Employer and Employee Declaration Form (EMP5387)

Retention trigger: Project cancelled or complete

Retention period: 6 years

Based on: [Canada Summer Jobs \(CSJ\) - Articles of Agreement](#)

Disposition: Destruction

Systems:

Security Class: Restricted

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 6 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 6 years prior to the disposition date

170 Staff Support Administration

Information related to staff support personnel, whether hired through external agencies or from the internal City staff support pool.

Includes but not limited to:

- Handbooks
- Leaves of absence
- Performance appraisals provided to agency
- Performance reviews
- Procedures, guidelines and process documents (for example, those relating to employment and staffing)
- Reports
- Requests for staff support
- Timesheets
- Tracking sheets
- Waivers for extension

Excludes:

- Individual employee information - refer to *2022 Human Resource Management - 070 Employment Records*.

Rules

Retention trigger: Current year

Retention period: 6 years

Based on: Business requirements

Disposition: Destruction

Systems: PeopleSoft

Security Class: Confidential

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 6 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 6 years prior to the disposition date

180 Time Reporting

Information related to the administration of scheduling, managing and reporting of work time programs between employees and their supervisors.

Includes but not limited to:

- Call-back agreement templates
- Daily manpower sheets and checklists
- Early close and overtime documentation
- Exception time log templates
- Job sharing guidelines
- Overtime tracking templates
- Procedures, guidelines and process documents (for example, those related to flexible hours)
- Shift and other schedules (for example, crew schedules, EDO and vacation schedules)

Excludes:

- Individual employee information - refer to *2022 Human Resource Management - 070 Employment Records*.

Rules - 001 Primary Version

Retention trigger: Current year

Retention period: 12 years

Based on:

Disposition: Destruction

Systems: Daily Electronic Time Sheets (DETS)
Learning Management System (LMS)
PeopleSoft

Security Class: Confidential

Rules - 002 Business Area Copies

Retention trigger: Current year

Retention period: 2 years

Based on:

Disposition: Destruction

Systems: Google and network drives

Security Class: Confidential

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

190 Training

Information related to the development and delivery of training at the corporate, department, branch or section level.

Includes but not limited to:

- Applications for training and training requests (Pre-Learning Management System)
- Certificates of completion, follow-up actions and feedback
- Coaching
- Conference invitations, name badges, registrations and tracking
- Consultant-developed training
- Custom training development
- Customer service phone recording examples
- eLearning, uPerform presentations, procedures and modules
- External registrations
- Forms and templates
- Memberships (for example, professional and association memberships)
- Needs assessments, evaluation and feedback
- Objectives, models, tools, strategies and resources
- Plans, strategies and research
- Post-training reports and evaluations
- Procedures, guidelines and process documents (for example, Customer Service Training and Front Counter Staff Customer Service Principles)
- Program and course descriptions, logistics and materials delivery
- Programs and courses (for example, Leadership Development, Mentorship Program, Speaker Series and Leadership Idea Exchange, First Aid, Aspiring Leaders programs)
- Registration processes, attendance lists, agendas and rosters
- Room setup requirements
- Schedules (for example, facilitators, facility availability, finalized training dates, implementation and staff schedules)
- Speaker biographies and information
- Supervisor and employee resources
- Trainer biographies and terms and conditions
- Training course and curriculum development plans

Excludes:

- Authority to travel forms and employee business expense statements - refer to *2018 Financial Management - 010 Accounting*.
- Individual employee training credentials - refer to *2022 Human Resource Management - 070 Employment Records*.
- Program communications - refer to *2006 Communications and Public Relations - 040 Marketing and Promotions*.
- Resource libraries - refer to *2024 Information Management - 050 Resource Library*.

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)
Business requirements

Disposition: Destruction

Systems: Learning Management System (LMS)

Security Class: Confidential

Notes

- All sensitive personal assessments, including diversity, psychometric, and Lynda.com assessments, must NOT be kept by the City. All such assessments must be retained by the employee only.
- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 6 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 6 years prior to the disposition date

200 Volunteers

Information related to persons providing volunteer services and the requirements and conditions of the service.

Includes but not limited to:

- Applications and assessments
- Contact lists
- Evaluations
- Hours worked and responsibilities
- Insurance information
- Job descriptions
- Orientation
- Planning
- Project proposals
- Recruitment
- Reference checks
- Reports
- Requests

Excludes:

- N/A

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Archives

Systems:

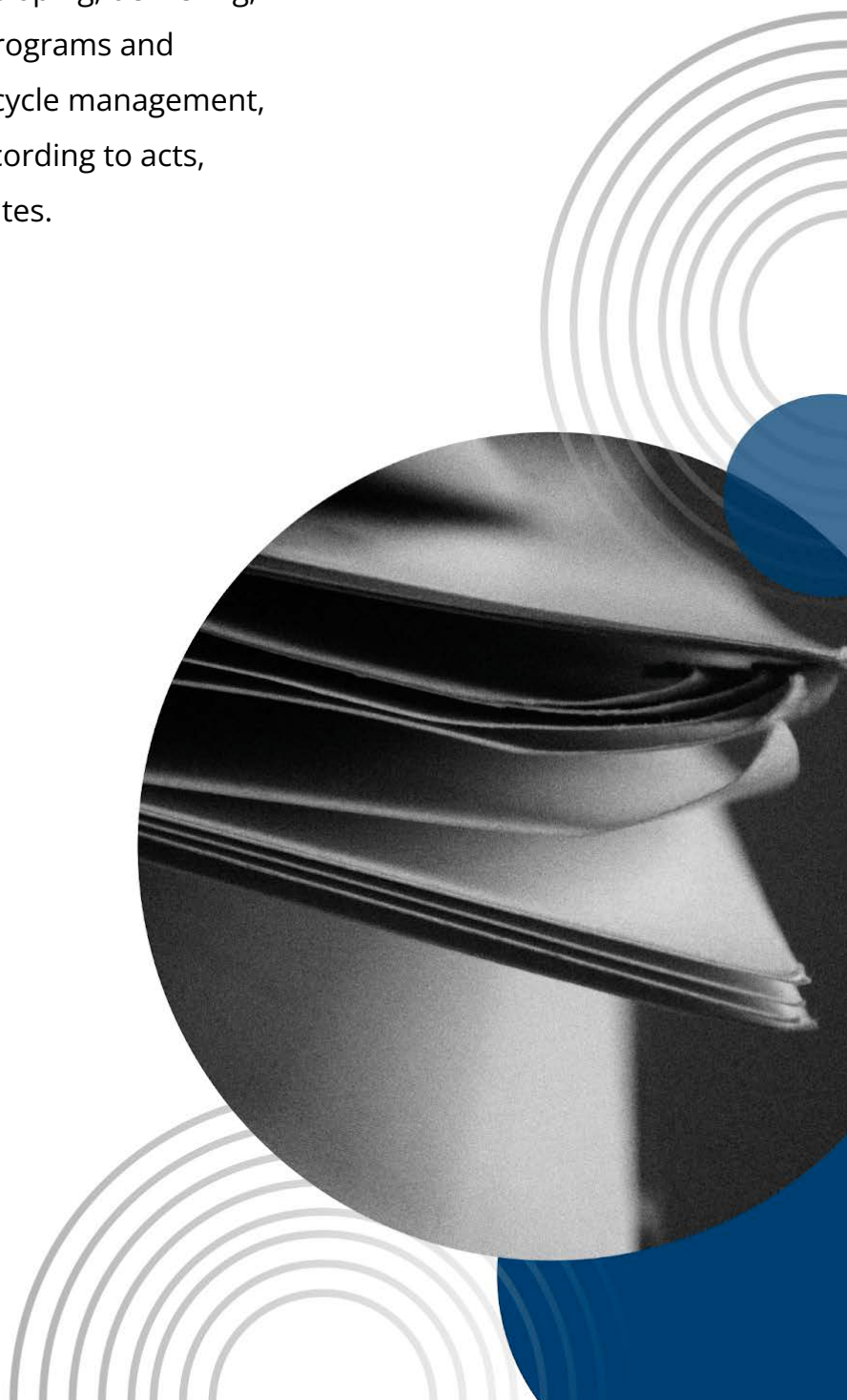
Security Class: Confidential

Notes

- N/A

2024 Information Management

This function relates to the developing, delivering, and managing of information programs and services including analytics, lifecycle management, security, access and privacy, according to acts, regulations, policies and mandates.



002 Archives Collection Program

Information used for the operation of the City of Edmonton Archives program. Program documentation includes procedural and process documents for the management of collections with enduring value.

Includes but not limited to:

- Accessions and finding aids
- Collection descriptions
- Procedures, guidelines and process documents

Excludes:

- N/A

Rules

Retention trigger: Permanent

Retention period: Permanent

Based on: Business requirements

Disposition: Permanent

Systems:

Security Class: Public

Notes

- N/A

005 Forms Management

Information related to the management of forms at the City.

Includes but not limited to:

- Fragments
- Official versions
- Style guides

Excludes:

- N/A

Rules

Retention trigger: Component revised or discontinued

Retention period: 6 years

Based on: Business requirement

Disposition: Destruction

Systems: Google Drive

Security Class: Internal

Notes

- N/A

010 Access and Privacy Administration

Information related to the administration of privacy and access, including routine disclosures, search of records requests and access requests.

Includes but not limited to:

- Applications, forms, templates and letters
- Meeting agendas, minutes and supporting documents
- Procedures, guidelines and process documents
- Reports

Excludes:

- CCTV camera data requests - refer to *2012 Corporate Security Services - 045 Security Surveillance Incidents*.
- Coordinating access and privacy training sessions - refer to *2022 Human Resource Management - 190 Training*.
- Executive Leadership Team (ELT) reports - refer to *2020 Governance - 170 Organizational Reports*.
- Records specific to individual employment - refer to *2022 Human Resource Management - 070 Employment Records*.

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: Business requirements

Disposition: Destruction

Systems:

Security Class: Internal

Notes

- N/A

012 Access to Information

Information related to the completion of requests for information submitted under the [Access to Information Act](#) or requests for information as part of routine disclosure, research requests and property searches.

Includes but not limited to:

- Access to Information applications and supporting documentation
- Application status and result letters
- Correction requests
- Correspondence with applicant
- Duplicates of unredacted records
- Information release packages
- Office of the Privacy Commissioner appeal documentation
- Public body or other jurisdiction consultation
- Routine disclosures

Excludes:

- CCTV camera data requests - refer to *2012 Corporate Security Services - 042 Security Surveillance Incidents*.
- Coordinating access and privacy training sessions - refer to *2022 Human Resource Management - 190 Training*.
- Executive Leadership Team (ELT) reports - refer to *2020 Governance - 170 Organizational Reports*.
- Records specific to individual employment - refer to *2022 Human Resource Management - 070 Employment Records*.

Rules

Retention trigger: Current year

Retention period: 3 years

Based on: [Access to Information Act](#)

Disposition: Destruction

Systems:

Security Class: Restricted

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 3 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 3 years prior to the disposition date.

016 Privacy Protection

Information related to the effective and lawful collection, use and disclosure of personal information belonging to identifiable individuals, as defined and required under the [Protection of Privacy Act](#) and *Generally Accepted Privacy Principles*.

Includes but not limited to:

- Breach notifications, investigations and final reports
- Directory of personal information banks within the City, including security classifications that identify restricted, confidential, internal or public information
- Office of the Information and Privacy Commissioner of Alberta inquiries and investigations
- Privacy complaints
- Privacy Impact Assessments (PIA)
- Privacy Impact Evaluations (PIE)
- Privacy investigations
- Reports

Excludes:

- CCTV camera data requests - refer to *2012 Corporate Security Services - 045 Security Surveillance Incidents*.
- Coordinating access and privacy training sessions - refer to *2022 Human Resource Management - 190 Training*.
- Executive Leadership Team (ELT) reports - refer to *2020 Governance - 170 Organizational Reports*.
- Records specific to individual employment - refer to *2022 Human Resource Management - 070 Employment Records*.

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)
[Protection of Privacy Act](#)
Estimated life of solution

Disposition: Destruction

Systems:

Security Class: Restricted

Notes

- N/A

018 Information Analytics

Information related to the process of collecting and analyzing data to make decisions based on descriptive, diagnostic, predictive and prescriptive analytics. This includes data and open sciences, analytic culture, analytic and open data curriculum and data management.

Includes but not limited to:

- Aggregate data
- Best practices
- Geospatial information
- Metadata standards
- Research
- Tools
- Tutorials

Excludes:

- Projects - refer to *2034 Project Management*.
- Training - refer to *2022 Human Resource Management - 190 Training*.

Rules

Retention trigger: Current year

Retention period: 12 years

Based on:

Disposition: Destruction

Systems: Google and network drives
SAP BI
Tableau
Viewpoint BI

Security Class: Restricted

Notes

- N/A

020 Information Management Programs

Information related to developing, implementing, reviewing and evaluating plans, procedures, standards, guidelines and best practices that support and direct information management programs that manage City information throughout all phases of the information life cycle. Information management programs may include compliance audits, digitization, disaster planning, disposition processes, file plan development, offsite storage and retrieval, record clean-up events, information security and access permissions.

Includes but not limited to:

- Assessments and evaluations
- File plans
- Forms and templates
- Legal hold tracking
- Pamphlets, infographics and brochures
- Presentations
- Procedures, guidelines and process documents
- Records requests
- Reports and statistics
- Retention schedule change requests

Excludes:

- Records inventories - refer to *2024 Information Management - 040 Information Lifecycle Management*.

Rules

Retention trigger: Program component revised or discontinued

Retention period: 12 years

Based on:

Disposition: Destruction

Systems: Google and network drives
OmniRIM

Security Class: Internal

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

040 Information Lifecycle Management

Information related to the administration of approved retention schedules and the disposition of City information in all media in accordance with the retention schedule.

Includes but not limited to:

- Classification and retention schedules
- Destruction certificates
- Disposition notices
- Disposition authorizations
- Record inventories and transfer forms

Excludes:

- Records requests - refer to *2024 Information Management - 020 Information Management Program*.
- Retention schedule change requests - refer to *2024 Information Management - 020 Information Management Program*.

Rules

Retention trigger: Permanent

Retention period: Permanent

Based on:

Disposition: Permanent

Systems: Google and network drives
FileTrail

Security Class: Confidential

Notes

- Completed *Certificates of Destruction* include the final records inventory.
- Obsolete and superseded retention schedules will be retained by Archives.

050 Resource Library

Information that is shared and used for reference purposes only. These resources are typically available publicly or with permission from third parties and can be shared routinely. This information may include photo, video, reference or technical libraries.

Includes but not limited to:

- Articles
- Learnings and information
- References
- Study guides

Excludes:

- N/A

Rules

Retention trigger: No longer required

Retention period: 2 years

Based on: Business requirements

Disposition: Destruction

Systems:

Security Class: Internal

Notes

- N/A

2026 Information Technology Management

This function relates to planning, developing, maintaining and managing technological architecture, hardware and software including providing technical support to staff, according to acts, regulations, policies, procedures and best practices.



010 Application and Hardware Administration

Information related to the routine administration of business applications and hardware.

Includes but not limited to:

- Application, technical or service specifications, instructions or reference material
- Audits, tracking sheets and reporting logs
- Procedures, guidelines and process documents

Excludes:

- Hardware contracts and agreements - refer to *2032 Materials, Services and Equipment Management - 030 Procurement and Contract Management*.
- Systems administration - refer to *2026 Information Technology - 012 Application and Hardware Operations*.

Rules

Retention trigger: Manual or standard no longer active

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems:

Security Class: Internal

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

012 Application and Hardware Operations

Information related to supporting staff with using information technology applications and hardware, including resolving issues and configuring requirements.

Includes but not limited to:

- Access requests
- Audits and logs
- Backup and recovery
- Code and script development
- Compliance and security documents
- Configuration and installation
- Contact lists
- Customer processes
- Divestitures
- Enhancement requests
- Estimates and requests
- Forms and templates
- Geospatial information
- Hardware refresh tracking
- IEX test runs
- Incident and problem reviews, process guides and logs
- Interfaces
- Plans, strategies and research
- Post-implementation reviews
- Remedy tickets
- Reports (for example, outage incident reports)
- Requests for change, contingency plans and changelogs
- Security access
- Service outage reviews
- Service support summary documents
- Software
- System access logs and compliance tracking
- Testing processes
- Upgrades

Excludes:

- 311 and other scripts - refer to *2006 Communications and Public Relations - 020 Customer Scripts and Messages*.
- Contracts and agreements - refer to *2032 Materials, Services and Equipment Management - 030 Procurement and Contract Management*.
- eLearning courses developed to support an application - refer to *2022 Human Resource Management - 190 Training*.
- Hardware inventories, refer to *2032 Materials, Services and Equipment Management - 020 Maintenance and Use*.
- Vendor invoices and payment - refer to *2018 Financial Management - 012 Accounting - Third Party Invoices*.

Rules - 001 Application and Hardware Records

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: GIS
POSSE
SAP

Security Class: Confidential

Rules - 002 Employee Digital Profiles

Retention trigger: Termination

Retention period: 4 years

Based on:

Disposition: Destruction

Systems:

Security Class: Confidential

Notes

- N/A

020 Enterprise Architecture

Information related to the planning and implementation of enterprise architecture.

Includes but not limited to:

- Architecture stewardship
- Opportunity and concept evaluations
- Solution architecture
- Value streams
- Workflows

Excludes:

- N/A

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: Business requirements

Disposition: Destruction

Systems:

Security Class: Confidential

Notes

- N/A

2028 Land Use Management

This function relates to the planning, developing, inspecting, servicing, and approving land use for residential, industrial and commercial lands within the City of Edmonton according to acts, regulations, bylaws and policies.



010 Land Use Administration

Information related to the administration of land use activities including planning, coordination, permits, inspections and heritage sites.

Includes but not limited to:

- Application packages
- Business process improvements
- Forms and checklists
- Manuals
- Procedures, guidelines and process documents
- Workflows

Excludes:

- Engineering and design standards and guidelines - refer to *2028 Land Use Management - 021 Engineering and Design Guidelines and Standards*.

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: Business requirements

Disposition: Destruction

Systems: Google and network drives

Security Class: Internal

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

012 Land Development Coordination and Planning

Information related to the planning, development, redevelopment and servicing of land from initial application to final inspection under *Zoning Bylaw 20001*, including residential, commercial, condominium, industrial, urban service, agricultural and reserve, direct control provisions, overlays, arterial roadways and special areas.

Includes but not limited to:

- Abandoned wells confirmation forms
- Area Redevelopment Plans (ARP)
- Area Structure Plans (ASP)
- Blueprints, drawings and plans
- Construction Completion Certificate (CCC)
- Construction improvement lists
- Consultation
- Cost assessments and analysis
- Development agreement
- Final Acceptance Certificate (FAC)
- Geospatial information
- Inspections
- Land development application
- Land Use Bylaw (LUB)
- Land use studies and reports
- Lane closures
- Municipal servicing agreements
- Neighbourhood Area Structure Plans (NASP)
- Neighbourhood Structure Plans (NSP)
- Notices
- Offsite levies
- Outline plans
- Plan amendments
- Public meetings
- Redistricting and text amendments
- Reviews, circulations, comments and opinions
- Rezoning and subdivision
- Road and lane closures
- Security letters
- Site plans
- Subdivision development applications
- Subdivision development approval meeting agendas and minutes
- Subdivision development approvals
- Variances

Excludes:

- Approved Land Use Bylaws - refer to *2020 Governance - 030 Bylaws, City Policies and Procedures*.
- Final amended bylaws - refer to *2020 Governance - 030 Bylaws, City Policies and Procedures*.
- Municipal development plans (MDP) and inter-municipal development plans (IDP) - refer to *2020 Governance - 200 Strategic Planning*.
- Subdivision and Development Appeal Board - refer to *2020 Governance - 210 Subdivision Development Appeal Board Administration* or - *215 Subdivision Development Appeal Board Decisions*.

Rules - 001 Official File

Retention trigger: Permanent

Retention period: Permanent

Based on: [Building Code Regulation, Alta. Reg. 5/2024](#)
[Municipal Government Act](#)
[Zoning Bylaw 20001](#)

Disposition: Permanent

Systems: POSSE

Security Class: Restricted

Rules - 002 Working Copies

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: Google and network drives

Security Class: Restricted

Rules - 003 Unsuccessful Land Development Applications

Retention trigger: Current year

Retention period: 50 years

Based on:

Disposition: Destruction

Systems: Google and network drives

Security Class: Restricted

Notes

- Development applications may be initiated by a developer or by the City itself.
- The planner associated with a development will collect original records during the life of the file.

020 Land Use Agreements

Information related to agreements for the development and use of land including crossing agreements, encroachment agreements, franchise agreement, municipal improvement agreements, right of entry, right-of-way consent and access agreement, supplementary agreements and utility right-of-way agreements.

Includes but not limited to:

- Agreement
- Applications
- Geospatial information
- Procedure
- Real property reports
- Requests

Excludes:

- Development and Municipal Servicing Agreements - refer to *2028 Land Use Management - 012 Land Development Coordination and Planning*.
- Leases - refer to *2010 Corporate Lands and Property Management - 055 Property Leases*.
- Utility line assignment permits - refer to *2028 Land Use Management - 056 Building and Development Permits and Inspections*.

Rules

Retention trigger: Date the agreement is issued

Retention period: Permanent

Based on: [Electronic Transactions Act](#)
[Limitations Act](#)
[Municipal Government Act](#)

Disposition: Permanent

Systems: POSSE

Security Class: Confidential

Notes

- N/A

021 Engineering and Design Guidelines and Standards

Information related to engineering and design standards, policies and guidelines set by the City.

Includes but not limited to:

- Access Management Guideline
- Architectural standards
- Complete Streets Guideline
- Design and Construction Standard
- Guidelines for Street Identification Signs
- LRT Design Guidelines
- Natural Area assessment
- Planning and Design Examples
- Playground Equipment Standard
- Sewer Design Standards and Guidelines
- Stormwater sewer pipe design standard
- Transportation Standards and Guidelines
- Utilities Standards and Guidelines

Excludes:

- Zoning and other bylaws - refer to *2020 Governance - 030 Bylaws, City Policies and Procedures*.

Rules

Retention trigger: Permanent

Retention period: Permanent

Based on:

Disposition: Permanent

Systems:

Security Class: Internal

Notes

- N/A

026 Environmental Reporting

Information related to conducting, investigating, reviewing and reporting on environmental impact and site assessments.

Includes but not limited to:

- Archaeological and socio-economic assessment
- Correspondence and job notes
- Environmental investigation
- Environmental site assessment reports (Phases I, II and III)
- Environmental warnings
- First Nations consultation
- Geoenvironmental reports
- Geospatial information
- Geotechnical investigation
- Land history
- Recommendations
- Soil contamination identification
- Stakeholders review

Excludes:

- N/A

Rules - 001 Official File

Retention trigger: Job complete

Retention period: Permanent

Based on:

Disposition: Permanent

Systems: INMAGIC
POSSE

Security Class: Confidential

Rules - 002 Working Copies

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: Google and network drives

Security Class: Confidential

Notes

- N/A

028 Infrastructure and Land Use Planning

Information related to the planning and designing of land and infrastructure within the City through collaboration with branches, their partners and the community to define needs, develop plans and create business cases. This includes defining the requirements with respect to budget, scope and schedule, in addition to complying with legislated requirements and City standards, policies and procedures.

Includes but not limited to:

- Assessments (risk, lifecycle costing)
- Development infrastructure impact model
- Director's Land Management Committee (Director of Land Governance RH chairs committee)
- Geospatial information
- Growth challenges
- Inspection reports
- Maps (original road maps, index maps)
- Meeting agendas and minutes
- Naming of roads and streets
- Photographs
- Renewal challenges and targets
- Reports and studies (assessment, engineering, consulting, environmental, feasibility, flood prone land)

Excludes:

- Infrastructure construction projects - refer to *2034 Project Management - 015 Infrastructure Projects*.
- Infrastructure strategies - refer to *2020 Governance - 200 Strategic Planning*.

Rules

Retention trigger: Current year

Retention period: 50 years

Based on: Business requirements

Disposition: Archives

Systems: POSSE

Security Class: Confidential

Notes

- N/A

030 Infrastructure Engineering

Information related to the engineering and design of land and infrastructure within the City as per standards, codes and legislation.

Includes but not limited to:

- Analysis and tests (for example, those related to quality assurance)
- Designs, drawing and plans as approved and as executed
- Engineering projects (environmental, geotechnical, facility, noise and vibration, pavement design, material testing)
- Engineering review circulations (real estate, development, neighbourhood, subdivision, environmental planning)
- Geospatial information
- Product approvals
- Specifications

Excludes:

- Infrastructure construction projects - refer to *2034 Project Management - 015 Infrastructure Projects*.
- Infrastructure strategies - refer to *2020 Governance - 200 Strategic Planning*.

Rules

Retention trigger: Demolition

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Archives

Systems: POSSE

Security Class: Confidential

Notes

- N/A

056 Building and Development Permits and Inspections

Information related to issuing and inspecting building and development permits in accordance with the *National Building Code – Alberta Edition, Safety Codes Act and Zoning Bylaw 20001*. This includes the following permit types; accessory building combo, commercial final, commercial footing/foundation, commercial structural framing, commercial excavation, commercial demolition, compliance certificate, curb crossing permit, home occupation permit, house combo, major development permit, minor development permit, mobile home move on, row-housing and semi-detached, combo and other miscellaneous permit types such as interior and exterior alterations, secondary suites, basement development, additions, hot tub, demolish single-detached and demolish an accessory building.

Includes but not limited to:

- Abandoned wells confirmation form
- Address files
- Applications
- Approved permits
- Blueprints, drawings and markups
- Correspondence and job notes
- Fire certification
- Hoarding agreements
- Landscape plans
- Lot grading
- Permit services reports
- Photographs
- Real property report
- Schedules
- Specifications

Excludes:

- Digitized paper records - refer to *2000 Transitory - 020 Quality Control*.
- Inquiries - refer to *2006 Communications and Public Relations - 030 Feedback and Inquiries*.

Rules - 001 Building and Development Permits and Inspections

Retention trigger: Permanent

Retention period: Permanent

Based on: [Building Code Regulation, Alta. Reg. 5/2024](#)
[Municipal Government Act](#)
[Zoning Bylaw 20001](#)

Disposition: Permanent

Systems: POSSE

Security Class: Restricted

Rules - 002 Cancelled, Expired and Refused Building and Development Permits

Retention trigger: Date cancelled, expired or refused

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: POSSE

Security Class: Restricted

Notes

- N/A

058 City Streets Access Permits

Information related to issuing and inspecting city streets access permits in accordance with *City Streets Access Bylaw 13521* to grant access between private property and controlled streets and prescribing the terms under which such permits may be revoked.

Includes but not limited to:

- Applications
- Payment notices
- Permits
- Registrations

Excludes:

- N/A

Rules

Retention trigger: Cancelled, expired or refused

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems:

Security Class: Confidential

Notes

- N/A

060 Fuel Storage Tank System Permits

Information related to issuing permits and inspecting fuel storage tank systems in accordance with the *National Fire Code - Alberta Edition*. This includes permits to remove, install or alter fuel tanks inside City limits issued through the online fuel tank permitting system.

Includes but not limited to:

- Applications
- Geotechnical reports
- Inspections
- Payment notice
- Permits
- Registration
- Site plan requirements and drawings

Excludes:

- N/A

Rules

Retention trigger: Tank removal

Retention period: 50 years

Based on: Environmental impact

Disposition: Destruction

Systems:

Security Class: Confidential

Notes

- N/A

061 Temporary Sign Permits

Information related to issuing temporary sign permits in accordance with Zoning Bylaw 20001.

Includes but not limited to:

- Applications
- Approved permits
- Blueprints and drawings
- Photographs
- Urban overhead signs

Excludes:

- N/A

Rules

Retention trigger: Cancelled, expired or refused

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: POSSE

Security Class: Confidential

Notes

- N/A

063 Mechanical Permits and Inspections

Information related to issuing and inspecting mechanical permits, both commercial and residential, that regulate the utilities servicing a property, such as water and sewer lines, interior plumbing, gas, heating, ventilation, air conditioning and electricity.

Includes but not limited to:

- Applications
- Approved permits
- Blueprints and drawings
- Codes and specifications
- Correspondence and job notes
- Schedules

Excludes:

- N/A

Rules

Retention trigger: Cancelled, expired or refused

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: POSSE

Security Class: Restricted

Notes

- N/A

065 Parking and Traffic Permits

Information related to issuing parking and traffic permits in accordance with *Traffic Bylaw 5590*. This includes permits for annual parking, visitor parking, temporary parking, meter parking, restricted parking, RV parking, heavy loads, road use, dangerous goods routes, on-street construction and maintenance (OSCAM) and roadway events. Roadway events include but are not limited to parades, processions, street festivals and runs or walks.

Includes but not limited to:

- Applications
- Payment notices
- Permits
- Proofs of residence
- Registrations

Excludes:

- N/A

Rules

Retention trigger: Cancelled, expired or refused

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: POSSE

Security Class: Confidential

Notes

- N/A

067 Vending Permits

Information related to issuing vending permits for mobile businesses to sell, display or distribute goods or services on City property (public street or other public space). City property includes roadways, sidewalks, parks and other property owned by the City.

Includes but not limited to:

- Applications
- Blueprints and drawings
- Copies of permits
- Correspondence and job notes
- Lists
- Photographs
- Reports

Excludes:

- N/A

Rules

Retention trigger: Cancelled, expired or refused

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: POSSE

Security Class: Confidential

Notes

- N/A

075 Zoning Clearance

Information related to zoning confirmation.

Includes but not limited to:

- Applications
- Blueprints and drawings
- Copies of permits
- Correspondence and job notes
- Lists
- Photographs
- Reports

Excludes:

- N/A

Rules

Retention trigger: Job completed

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems: POSSE

Security Class: Confidential

Notes

- N/A

084 Heritage Management

Information related to the identification, facilitation, protection, management and promotion of the preservation and reuse of historic resources to enhance the quality of Edmonton’s environment for the benefit of present and future generations.

Includes but not limited to:

- Designation
- Geospatial information
- Inventory and evaluation processes
- Inventory and Register of Historic Resources
- Notice of intention to designate
- Research and Environmental Site Assessments 1 (history of the land)

Excludes:

- Boards and foundations - refer to *2020 Governance - 150 Intergovernmental and External Relations*.
- Heritage Reserve Fund - refer to *2018 Financial Management - 010 Accounting*.
- Heritage-related standards, guidelines and forms - refer to *2028 Land Use Management - 010 Land Use Administration*.
- Historic Resource Management Plan - refer to *2020 Governance - 200 Strategic Planning*.
- Public inquiries - refer to *2006 Communications and Public Relations - 030 Feedback and Inquiries*.
- Special and neighbourhood area projects - refer to *2034 Project Management*.

Rules

Retention trigger: Designation issued

Retention period: Permanent

Based on: Business requirements

Disposition: Permanent

Systems: Google and network drives
POSSE

Security Class: Confidential

Notes

- N/A

2030 Legal Services

This function relates to the administration of legal matters for the City of Edmonton, including legal opinions, litigation, claims and risk.



010 Agreement Register

Information related to the original executed copies of agreements entered into, and bound to, by the City, which have been reviewed for accuracy and completion by the Office of the City Clerk and bear the corporate seal.

Includes but not limited to:

- Agreements and contracts
- Land sales
- Leases

Excludes

- Collective agreements - refer to *2022 Human Resource Management - 030 Collective Agreements and Bargaining*.
- Procurement - refer to *2032 Materials, Services and Equipment - 030 Procurement and Contract Management*.
- Records of agreement development, negotiation, amendments, issues resolution and vendor relationship management - refer to *2032 Materials, Services and Equipment - 030 Procurement and Contract Management*.

Rules

Retention trigger: Expiry of agreement

Retention period: Permanent

Based on: [Limitations Act](#)

Disposition: Permanent

Systems:

Security Class: Restricted

Notes

- This series applies only to the original agreements that are stored separately from their related files and record series. For example, procurement files may contain a signed original agreement that will be retained as part of the procurement process and therefore would not be included in this record series.

020 Public Incident Reporting

Information related to the documentation of incidents involving personal injury, questionable activity, collisions, falls and/or damage to City property, where a member of the public experienced an incident. This also includes records relating to acts of vandalism and records of collisions involving City-owned road and traffic assets and/or vehicles.

Includes but not limited to:

- Incident reporting forms
- Collision reports
- Investigations, follow up and resolution

Excludes:

- Claims - refer to 2030 Legal Services - 060 Litigation and Prosecution.
- Health and safety incident reporting for employees - refer to 2022 Human Resource Management - 090 Occupational Health and Safety.
- Litigation - refer to 2030 Legal Services - 060 Litigation and Prosecution.

Rules - 001 Incidents

Retention trigger: Close of investigation or date of motor vehicle collision

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems:

Security Class: Confidential

Rules - 002 Incidents with Minors requiring EMS

Retention trigger: Close of investigation or date of motor vehicle collision

Retention period: 30 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems:

Security Class: Confidential

Notes

- N/A

030 Insurance Coverage

Information related to the purchase of insurance policies.

Includes but not limited to:

- Bonds and letters of credit
- Certificates of insurance
- Liability insurance policies (general, auto, E&O and D&O, wrap up, caretakers, user, aviation)
- Property insurance policies (property, course of construction, boiler and machinery, fine arts, crime)

Excludes:

- N/A

Rules - 001 Property Insurance

Retention trigger: Policy expired

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems:

Security Class: Confidential

Rules - 002 Liability Insurance

Retention trigger: Policy expired

Retention period: 30 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems:

Security Class: Confidential

Notes

- N/A

040 Legal Advice and Consultation

Information related to formal legal opinions, solicitor-client advice and general legal consultation provided by Legal Services on a wide range of issues, including risk management.

Includes but not limited to:

- Agreement preparation and review
- Agreements that do not materialize into official documents
- Bylaw preparation and review
- Correspondence
- External legal counsel opinions
- Legal opinions
- Legislative amendments
- Precedents for reference
- Report preparation

Excludes:

- Litigation, prosecution and claims - refer to *2030 Legal Services - 060 Litigation and Prosecution*.

Rules - 001 Legal Advice and Consultation

Retention trigger: Close of file

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems:

Security Class: Restricted

Rules - 002 Land, Lease and Servicing Agreements

Retention trigger: Current year

Retention period: Permanent

Based on: Business requirements

Disposition: Permanent

Systems:

Security Class: Restricted

Rules - 003 Borrowing Bylaw

Retention trigger: Current year

Retention period: 150 years

Based on: [Limitations Act](#)
Business requirements

Disposition: Destruction

Systems:

Security Class: Restricted

Notes

- N/A

060 Litigation and Prosecution

Information related to claims, litigation and prosecution.

Includes but not limited to:

- Alberta Court of Appeal tribunal files
- Bankruptcy and receivership
- Builders' liens
- Claims
- Copies of relevant agreements
- Court documents
- Evidence
- External legal advice
- Grievances
- Judicial reviews
- Legal counsel opinion
- Legal research
- Pleadings
- Pleadings and submissions
- Precedents
- Resolutions
- Significant decisions
- Solicitor-client advice
- Statutory appeals
- Suspended driver's licence files

Excludes:

- N/A

Rules - 001 Decisions and Claims

Retention trigger: Current year

Retention period: 40 years

Based on: [Limitations Act](#)
Business requirements

Disposition: Destruction

Systems:

Security Class: Restricted

Rules - 002 Bylaw Files

Retention trigger: Current year

Retention period: 3 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems:

Security Class: Restricted

Notes

- N/A

2032 Materials Services and Equipment Management

This function relates to acquiring, managing, and disposing of products, goods, services, materials and equipment according to acts, regulations, policies and procedures.



010 Fleet Management

Information related to the planning and management of leased and City-owned vehicles.

Includes but not limited to:

- Bulk fuel deliveries
- Driving instructions
- Fleet planning
- Fuel access, consumption, orders and requisitions
- General maintenance and detailing schedules
- Leased vehicle unit file jackets (for example, vehicle condition reports, damage and repair claims, lease history, service sheets, outline agreements)
- Logbooks, rental requests and vehicle bookings
- Parking permit tracking
- Sign-off forms
- Surplus
- Traffic violations (speeding, photo radar, red lights)
- Vehicle insurance, registration, identification numbers and licence plates
- Vehicle Take Home Permits
- Vehicle Use Audits

Excludes:

- Fleet safety training - refer to 2022 Human Resource Management - 190 Training.
- Ticketed infractions, City driving permits and suspensions - refer to 2022 Human Resource Management - 070 Employment Records.

Rules

Retention trigger: Current year

Retention period: 6 years

Based on:

Disposition: Destruction

Systems:

Security Class: Confidential

Notes

- N/A

015 Fleet Maintenance

Information related to maintenance, cleaning, use and repair of leased and City-owned vehicles. This includes servicing, diagnostics and preventative maintenance inspections.

Includes but not limited to:

- Additional parts requests
- Bus history
- Certifications
- Change orders
- Cleaning inspection checklists
- Commercial Vehicle Inspection Program (CVIP) maintenance
- Edmonton Police Service (EPS) Motor Vehicle Accident Reports
- Fabrication drawings, specifications, costing and estimates
- Failure/breakdown reports
- Garage control sheets
- Guarantees and warranties
- Material request sheets (for example, dust-busting, changeovers, defects, fluid top-up and battery boost gang, hired equipment service, tire brand inspection request sheets)
- Oil usage sheets
- Shop tool inventories
- Technical and operating manuals
- Vehicle history, in-service logs, inspections, investigations, maintenance and repair reports, registrations, requirements, specifications
- Vehicle maintenance forms
- Weekly planning sheets
- Work order registers and autotech assignments

Excludes:

- Fleet safety training - refer to *2022 Human Resource Management - 190 Training*.
- Ticketed infractions, City driving permits and suspensions - refer to *2022 Human Resource Management - 070 Employment Records*.

Rules

Retention trigger: Life of asset

Retention period: 12 years

Based on: [Limitations Act](#)
[Occupational Health and Safety Code, Alta Reg 191/2021](#)

Disposition: Destruction

Systems:

Security Class: Confidential

Notes

- N/A

020 Maintenance and Use

Information related to maintenance, use and repair of equipment, material and services.

Includes but not limited to:

- Bill of materials and changes
- Complaints
- Contact lists
- Courier and freight rates and services
- Courier, mail and freight slips
- Critical parts lists
- Cycle counts
- Distribution and mailing lists
- Equipment manuals (for example, those for backhoes, mowers and snow blowers)
- Ice resurfacer reports
- Inventories and inventory movement reports
- Job tickets and work orders
- Logs and schedules
- Mail services documentation
- Maintenance plans, maintenance schedules and change requests
- Materials and part requests
- Operating manuals (for example, those for smartboards)
- Operational signage (for example, fire exit signs)
- Parts catalogues
- Permits and exemptions
- Postage meter activity reports
- Postal rates and regulations
- Procedures, guidelines and process documents
- Receipts of registered and certified mail
- Registrations, licensing and permits
- Reports (for example, fuel analysis, greens conditions and ice thickness reports)
- Requests and work orders
- Resource guides
- Routes and schedules
- Shelving replacements
- Specification sheets and technical specifications
- Supply chain management
- Tracking lists and logs
- Warranties

Excludes:

- Contracts and agreements - refer to *2032 Materials, Services and Equipment Management - 030 Procurement and Contract Management*.
- ENVISO - refer to *2020 Governance - 148 Environmental Management*.
- Safety Data Sheets (SDS) and Materials Safety Data Sheets (MSDS) - refer to *2032 Materials, Services and Equipment Management - 046 Safety Data Sheets*.
- Ticketed infractions, carrier profiles, City driving permits and driver suspensions - refer to *2022 Human Resource Management - 070 Employment Records*.

Rules

Retention trigger: Life of asset or end of use

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems:

Security Class: Confidential

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

030 Procurement and Contract Management

Information related to the contracting process for new purchases or acquisitions of materials, services, equipment and vehicles.

Includes but not limited to:

- Advice to clients
- Awards and other responses
- Bids, tenders, proposals and submissions
- Bonds and letters of credit
- Business cases
- Buyer reports
- Competitive Process Exception Request forms
- Contact lists
- Contractor files (including payments, contact information, evaluations, hours worked, responsibilities, insurance information, job descriptions, orientation and training, post-training reports, returned items form)
- Contracts and agreements
- Evaluation plans and declarations
- Forms and templates
- Grading recaps, evaluation and pre-qualification criteria
- Legal review and advice
- Plans, strategies and research
- Post-delivery evaluations and vendor performance reports
- Procedures, guidelines and process documents
- Professional Services Agreements (PSAs) (for example, open, limited and sole source contracting agreements)
- Proposals, addendums, responses and negotiations
- Reports and analytics
- Requests for Information (RFIs), Requests for Quote (RFQs) and Requests for Proposal (RFPs)
- Specifications
- Supplier rebates
- Tenders and tender runs
- Unsuccessful bidders lists
- Vendor contracts
- Vendor control and management documentation (for example, Electronic Funds Transfer (EFT) analysis, Evaluated Receipt Settlement (ERS) issues)
- Vendor name change advice
- Vendor responses and liaison
- Waivers

Excludes:

- Vendor invoices and payments - refer to *2018 Financial Management - 010 Accounting*.

Rules - 001 Procurement and Contracts

Retention trigger: Contract expired or cancelled

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Archives

Systems:

Security Class: Confidential

Rules - 002 Unsuccessful Bids

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)

Disposition: Destruction

Systems:

Security Class: Confidential

Notes

- Contract expiration period includes the expiration of renewal and warranty periods.
- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

040 Routine Purchases

Information related to the routine purchases, lease or rental of material, supplies, services and equipment.

Includes but not limited to:

- Approvals
- Catalogues
- Contact lists
- Forms and templates (for example, order forms and requisitions)
- Orders (for example, those for business cards, catering, signs and uniforms)
- Packing lists
- Price comparisons
- Print orders and job tickets (for example, forms, letterhead, posters, mail outs and ticket orders)
- Procedures and guidelines
- Procedures, guidelines and process documents
- Purchase orders and quotations
- Reports
- Waybills

Excludes:

- Bills of sale - refer to *2018 Financial Management - 010 Accounting*.
- Contracts and agreements, Request for Proposals, Information and Quotes - refer to *2032 Materials, Services and Equipment Management - 030 Procurement and Contract Management*.
- Non-routine orders and purchases - refer to *2032 Materials, Services and Equipment Management - 030 Procurement and Contract Management*.
- Vendor invoices and payments - refer to *2018 Financial Management - 012 Accounting Third Party Invoices*.

Rules

Retention trigger: Current year

Retention period: 6 years

Based on: [Income Tax Act](#)

Disposition: Destruction

Systems:

Security Class: Confidential

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 6 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 6 years prior to the disposition date

046 Safety Data Sheets

Information related to Safety Data Sheets for all hazardous products.

Includes but not limited to:

- Safety Data Sheets (SDS) and Material Safety Data Sheets (MSDS)

Excludes:

- N/A

Rules

Retention trigger:	Date replaced by updated SDS posting
Retention period:	75 years
Based on:	City of Edmonton OHS Standard WHMIS 2015 (GHS)
Disposition:	Destruction
Systems:	MSDS Viewer
Security Class:	Internal

Notes

- N/A

050 Surplus

Information related to the disposal and recycling of equipment, parts, vehicles and computer hardware.

Includes but not limited to:

- Collision and write-off files
- Contact lists
- Disposal listings
- Donations
- Inventories and descriptions
- Procedures, guidelines and process documents
- Recycling
- Reports
- Requests
- Sales

Excludes:

- N/A

Rules

Retention trigger: Current year

Retention period: 2 years

Based on: Business requirements

Disposition: Destruction

Systems:

Security Class: Confidential

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 2 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 2 years prior to the disposition date.

060 Utility Services

Information related to the delivery and management of utilities for a client group, including providing heating and cooling.

Includes but not limited to:

- Customer consumption and billing files
- DESS liquid inlet/outlet temperature and flow readings
- Location and client information
- Meter numbers documentation
- Monthly and yearly usage reports
- Usage readings (for example, cumulative cooling and heating readings)

Excludes:

- Management of utility services received by corporate properties from third-party vendors (outage notifications, meter billing applications, measurement and verification tracking, utility estimations) - refer to *2010 Corporate Lands and Property Management - 025 Facility and Grounds Operations*.

Rules - 001 Daily Readings

Retention trigger: Current year

Retention period: 3 years

Based on: [Alberta Utilities Commission Rule 004: Alberta Tariff Billing Code Rules 2.14 \(1\)](#)

Disposition: Destruction

Systems:

Security Class: Confidential

Rules - 002 Monthly and Yearly Reporting and Billing

Retention trigger: Current year

Retention period: 7 years

Based on: [Alberta Utilities Commission Rule 004: Alberta Tariff Billing Code Rules 2.14 \(2\)](#)

Disposition: Destruction

Systems:

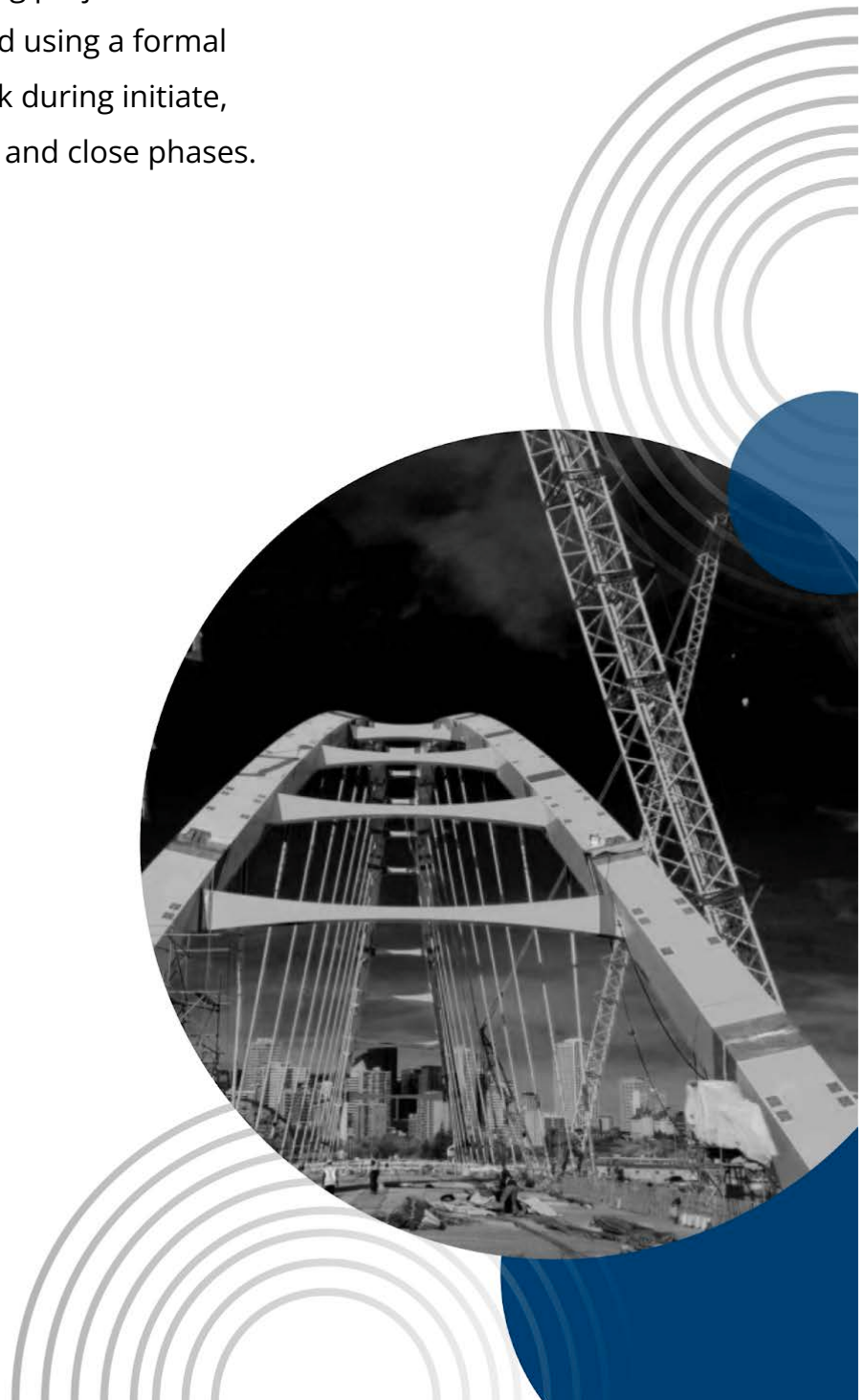
Security Class: Confidential

Notes

- Although the AUC Rule 004 is intended for electricity and natural gas utilities, it is also an appropriate model of reference for the Blatchford Renewal Energy Utility.

2034 Project Management

This function relates to managing projects with a definitive start and end date and using a formal project management framework during initiate, plan, execute, monitor, control, and close phases.



005 Project Administration

Information related to the administration of projects.

Includes but not limited to:

- Manuals
- Procedures, guidelines and process documents
- Toolkits
- Workflows

Excludes:

- N/A

Rules

Retention trigger: Current year

Retention period: 6 years

Based on: Business requirements

Disposition: Destruction

Systems:

Security Class: Internal

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 6 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 6 years prior to the disposition date

010 Corporate Projects

Information related to projects for corporate, department, branch, section and unit administrative improvements. Corporate projects follow a standardized project framework with definitive start and end date.

Includes but not limited to:

- Budget information and cost analyses
- Business process analysis
- Change requests
- Communication, change and risk management plans
- Lessons learned, surveys and feedback
- Network diagrams, Gantt charts and work breakdown structures
- Project charters
- Project team meeting agendas, action items and minutes
- Records of project execution, monitoring and close-out
- Related agreements and procurement documents kept for reference
- Statements of work
- User requirements and testing records

Excludes:

- Contracts and agreements - refer to 2032 *Materials, Services and Equipment Management* - 030 *Procurement and Contract Management*.
- Infrastructure construction projects - refer to 2034 *Project Management* - 015 *Infrastructure Projects*.
- Corporate initiative records - refer to 2020 *Governance* - 080 *Corporate Initiatives*.

Rules

Retention trigger: End of project

Retention period: 12 years

Based on:

Disposition: Archives

Systems: Google and network drives

Security Class: Confidential

Notes

- Documents may go through multiple iterations in the course of a project. All final approved versions are retained in the closed project file in order to fully document its evolution over time.

015 Infrastructure Projects

Information related to municipal infrastructure construction projects such as public buildings (office buildings, recreation and leisure facilities, fire stations), transport infrastructure (roads, bridges, light rail transit, sidewalks), public spaces (public squares, parks), public services (water supply, sewage) and other long-term physical assets.

Includes but not limited to:

- Budget
- Business cases
- Change requests
- Contact lists
- Cost estimates and analysis
- Design approvals
- Impact identification
- Issues logs
- Maps
- Plans, strategies and research (for example, those relating to change management, communications, configuration management, cost, human resources, mitigation, process improvement, procurement, project, quality, risk, schedule and scope)
- Project charters
- Quality assurance and testing records
- Reports (status, lessons learned, project hand-off and close-out)
- Risk register
- Studies, risk assessments, confirmation of project justification
- Warranties

Excludes:

- Developing and servicing raw land between the City and the private development industry - refer to *2028 Land Use Management - 012 Land Development Coordination and Planning*.
- Plans and permits - refer to *2028 Land Use Management*.

Rules

Retention trigger: Life of infrastructure

Retention period: 25 years

Based on:

Disposition: Archives

Systems: Google and network drives
Project Management Information System (PMIS)

Security Class: Confidential

Notes

- N/A

020 Municipal Projects

Information related to municipal projects not involving infrastructure but directly impacting citizens, including civic events, neighbourhood projects, recreation and social projects and heritage projects.

Includes but not limited to:

- Budget information and cost analyses
- Business process analysis
- Change requests
- Communication, change and risk management plans
- Lessons learned, surveys and feedback
- Network diagrams, Gantt charts and work breakdown structures
- Project charters
- Project team meeting agendas, action items and minutes
- Records of project execution, monitoring and close-out
- Related agreements and procurement documents kept for reference
- Statements of work
- User requirements and testing records

Excludes:

- Contracts and agreements - refer to *2032 Materials, Services and Equipment Management - 030 Procurement and Contract Management*.
- Infrastructure construction projects - refer to *2034 Project Management - 015 Infrastructure Projects*.

Rules

Retention trigger:	End of project
Retention period:	12 years
Based on:	
Disposition:	Archives
Systems:	Google and network drives
Security Class:	Confidential

Notes

- N/A

2036 Transit Services

This function relates to providing Edmonton citizens with an integrated public transport service, including bus, light rail transit and disabled adult transit services.



010 Transit Clients

Information related to clients that use personalized transit programs including Disabled Adult Transit Services (DATS).

Includes but not limited to:

- Client information
- Client notifications
- DATS bookings and cancellations
- DATS schedules and schedule solutions
- DATS vehicle data (OPS- tracker action log)
- Event data
- Interactive Voice Response (IVR) data
- Medical information
- Operator logs and checklists
- Operator work and process information
- Pick up and drop off locations
- Session data
- Special routes
- Trip analysis and information

Excludes:

- Non-client DATS program information - refer to 2036 Transit Services - 040 Transit Programs.

Rules

Retention trigger: Current year or client inactive

Retention period: 6 years

Based on:

Disposition: Destruction

Systems: DATS

Security Class: Confidential

Notes

- N/A

020 Transit Fare Administration

Information related to the administration of transit fares.

Includes but not limited to:

- Fare information
- Fare rates
- Forms and templates
- Procedures, guidelines and process documents

Excludes:

- Financial transactions and accounting information - refer to *2018 Financial Management - 010 Accounting*.
- Unused transit fare products, including unused bus passes and other products - refer to *2000 Transitory Information - 005 Transitory Information*.

Rules

Retention trigger: Current year

Retention period: 6 years

Based on:

Disposition: Destruction

Systems: APEX

Security Class: Confidential

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 6 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 6 years prior to the disposition date

030 Transit Operations

Information related to the operations of transit services that move citizens around the city using public transit, including Disabled Adult Transit Service (DATS), Light Rail Transit (LRT), trains, buses, vans, tracks, transit centres, LRT Stations, signal systems, traction power systems, fare machines, communication systems, bus shelters and benches.

Includes but not limited to:

- Alerts and service updates
- Assigned service checks
- Certification and notification data
- Correction cards
- Daily reports
- Dispatch runs
- Driver runs
- Geospatial information
- Incident and inspections management
- Incident investigations
- Lost and found logs
- LRT day files
- LRT track maintenance (shift activity reports, defect reporting forms)
- LRT track safety
- Map information and data
- Passenger, station and vehicle counts
- Regional services
- Stop requests
- Transit notice changes
- Transit vehicle technology
- Vehicle and online audits
- Verification reports

Excludes:

- Complaints and commendations - refer to *2006 Communications and Public Relations - 030 Feedback and Inquiries*.
- Enforcement - refer to *2004 Bylaw Services and Enforcement - 010 Bylaw Complaints and Enforcement*.
- ENVISO - refer to *2020 Governance - 148 Environmental Management*.
- Projects - refer to *2034 Project Management*.
- Security incidents and investigations - refer to *2012 Corporate Security Services - 020 Security Incidents*.
- Staff training - refer to *2022 Human Resource Management - 190 Training*.
- Transit planning and engineering - refer to *2028 Land Use Management*.
- Vehicle maintenance - refer to *2032 Materials, Services and Equipment - 015 Fleet Maintenance*.

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Occupational Health and Safety Code, Alta Reg 191/2021](#)
Business requirements

Disposition: Destruction

Systems: CalAmp Transit Count System (TCS)
 DATS Transit Engineering Software (TES)
 Trapeze

Security Class: Confidential

Notes

- N/A

040 Transit Programs

Information related to developing and delivering transit programs. Programs may include community sponsorship programs, key programs, school programs, senior programs, key partnerships and accessibility.

Includes but not limited to:

- Advisory group records
- Bus hailer kits
- Cards templates and tracking records
- Community sponsorship program records
- Customer communication cards
- Program bookings and cancellations
- Program documents
- Training courses and material
- Transit watch listings and monitoring records

Excludes:

- DATS client information - refer to 2036 Transit Services - 010 Transit Clients.

Rules

Retention trigger: Current year

Retention period: 6 years

Based on:

Disposition: Destruction

Systems: DATS

Security Class: Confidential

Notes

- Archives will receive advisory group records.

050 Transit Routes and Schedules

Information related to planning schedules, routes and bus stop locations for routine use, charters, special events, seasonal and late-night owl services.

Includes but not limited to:

- Accessible transit
- Brochures
- Bus stop and bus shelter locations maps
- Charter bus bookings records
- Detour routes
- Geospatial information
- Maps (current system, upcoming system, transit centre)
- Official schedules
- Regional services agreements
- Schedules and routes
- Special event service plans

Excludes:

- N/A

Rules - 001 Booking Records, Geospatial Information, Service Agreements and Special Event Service Plans

Retention trigger: Current year

Retention period: 6 years

Based on:

Disposition: Destruction

Systems: Hastus
Charter
Scheduling and Design System

Security Class: Confidential

Rules - 002 Transit Maps, Brochures and Schedules

Retention trigger: Current year

Retention period: 6 years

Based on:

Disposition: Archives

Systems: Hastus
Charter
Scheduling and Design System

Security Class: Confidential

Notes

- N/A

2042 Waste Management

This function relates to Edmonton waste management programs and services, including collecting, processing, recycling, removing and disposing of both regulated and unregulated waste and managing facilities, landfills, composting sites and administering programs.



010 Waste Operations

Information related to the operations of waste services, including waste collection, eco station and reuse centre management, and solid waste disposal for residential and non-residential customers.

Includes but not limited to:

- Aggregate (concrete, asphalt) recycling records
- Commercial Waste Management Services records
- [Community recycling depot records](#)
- Construction and demolition (C&D) waste recycling records
- Eco Stations for household hazardous waste and other waste
- Electrical and electronic waste recycling records
- Geospatial information
- Groundwater testing (excluding landfill testing)
- Inspections and investigations
- [Integrated processing and transfer station records](#)
- Materials Recovery Facility (MRF) records
- Organics processing, litter collection and Big Bin Event records
- Plans, routes and schedules
- Procedures, guidelines and process documents
- Reports and work orders
- Residential blue bag or blue bin recycling and garbage collection records

Excludes:

- Composting and recycling programs - refer to *2042 Waste Management - 030 Waste Programs*.
- Environmental programs - refer to *2020 Governance - 148 Environmental Management*.
- GPS data - refer to *2000 Transitory Information - 020 Quality Control*.
- Volunteers - refer to *2022 Human Resource Management - 200 Volunteers*.
- Waste complaints, public education and marketing - refer to *2006 Communications and Public Relations*.

Rules

Retention trigger: Current year

Retention period: 12 years

Based on: [Limitations Act](#)
[Occupational Health and Safety Code, Alta Reg 191/2021](#)

Disposition: Destruction

Systems: Google and network drives
Supervisory Control and Data Acquisition (SCADA)

Security Class: Confidential

Notes

- Archives will receive procedures, guidelines and process documents, reports, and information related to inspections.
- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 12 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 12 years prior to the disposition date.

020 Waste Landfill Management

Information related to the development, monitoring, quality control, closure and post-closure of Class I, II and III landfills in the City of Edmonton.

Includes but not limited to:

- Analysis and corrective action records
- Geospatial information
- Groundwater monitoring
- Inspections and investigations
- Landfill development, siting, design and construction records
- Landfill disposal and closure records
- Landfill gas recovery and monitoring documents
- Leachate monitoring
- Maps
- Plans and schedules
- Procedures, guidelines and process documents
- Reports and work orders
- Surface water monitoring records

Excludes:

- Composting and recycling programs - refer to 2042 Waste Management - 030 Waste Programs.
- Environmental programs - refer to 2020 Governance - 148 Environmental Management.
- Volunteers - refer to 2022 Human Resource Management - 200 Volunteers.
- Waste complaints, public education and marketing - refer to 2006 Communications and Public Relations.

Rules

Retention trigger: Final landfill closure

Retention period: 25 years

Based on: [Environmental Protection and Enhancement Act Standards for Landfills in Alberta](#)
[Waste Services Bylaw 20363](#)

Disposition: Archives

Systems: Google and network drives
Supervisory Control and Data Acquisition (SCADA)

Security Class: Confidential

Notes

- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 25 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 25 years prior to the disposition date.

030 Waste Programs

Information related to developing and delivering waste programs. Programs include but are not limited to: Assisted Waste, Big Bin, Bin Maintenance, Christmas Trees, Commercial Collection and Waste, Curbside Collection, Home Composting, Litter, Composter and Recycler, Multi-Family Collection, Roll-Off Service and Wasteless Holidays.

Includes but not limited to:

- Assessments
- Background information
- Evaluations
- Geospatial information
- Incident and inspections management
- Incident investigations
- Maps
- Plans and schedules
- Procedures, guidelines and process documents
- Program development
- Reports and work orders

Excludes:

- Environmental programs - refer to *2020 Governance - 148 Environmental Management*.
- Volunteers - refer to *2022 Human Resource Management - 200 Volunteers*.
- Waste complaints, public education and marketing - refer to *2006 Communications and Public Relations*.

Rules

Retention trigger: Current year

Retention period: 6 years

Based on: [Occupational Health and Safety Code, Alta Reg 191/2021](#)

Disposition: Destruction

Systems:

Security Class: Confidential

Notes

- Archives will receive procedures, guidelines and process documents.
- Instructional documents in this record series, including procedures, guidelines, tip sheets and process documents, must be kept for 6 years after they are last used. Once these documents have completed their retention period, please review and confirm that they have not been used in the 6 years prior to the disposition date

### Record Series Template		##### FUNCTION TITLE
Information related to		
Includes but not limited to: • Abc		
Excludes: • ABC - refer to <i>Function - Record Series</i>.		
Rules		
Retention trigger:		
Retention period:		
Based on:		
Disposition:		
Systems:		
Security Class:		
Notes		
• N/A		