

**Changes made to Schedule A – Records Retention and Disposition Amending By-law 2018-XXX
To accompany Report to Council for RRD Amending By-law 2018-XXX**

Part 1: Standard Changes

A Asset Management

Classification Code	Records Classification Name	Years Active	Inactive Retention Trigger	Years Inactive	Final Disposition	Explanation of Changes
A02-00	General	3	n/a	3	Destroy	Retention period changed from "Active=2 Years / Inactive=1 Years" to "Active=3 Years / Inactive=3 Years" to align with business requirements.
A03-00	General	3	n/a	3	Destroy	Retention period changed from "Active=2 Years / Inactive=1 Years" to "Active=3 Years / Inactive=3 Years" to align with business requirements.

C Communications and Marketing

Classification Code	Records Classification Name	Years Active	Inactive Retention Trigger	Years Inactive	Final Disposition	Explanation of Changes
C16	Municipal Friendship Agreements	n/a	n/a	n/a	n/a	Secondary classification closed. Records relating to 'Municipal Friendship Agreements' are more accurately placed in the 'Governance and Corporate Management' primary subject area rather than 'Communications and Marketing'. [Note: Affected records now declared under new G21 (Municipal Friendship Agreements and Initiatives) Secondary].

C16-00	General	3	n/a	3	Destroy	Tertiary classification closed. Records relating to 'Municipal Friendship Agreements' are more accurately placed in the 'Governance and Corporate Management' primary subject area rather than 'Communications and Marketing'. [Note: Affected records now declared under new G21-00 (General) Tertiary].
C16-01	Special Friendship Agreements	T	Agreement completed	6	Permanent: Sent to City Archives	Tertiary classification closed. Records relating to 'Municipal Friendship Agreements' are more accurately placed in the 'Governance and Corporate Management' primary subject area rather than 'Communications and Marketing'. [Note: Affected records now declared under new G21-01 (Specific Municipal Friendship Initiatives) Tertiary].

D Development and Planning

Classification Code	Records Classification Name	Years Active	Inactive Retention Trigger	Years Inactive	Final Disposition	Explanation of Changes
D00-02	Development and Planning – Registered Mail Lists	T	Superseded	10	Destroy	New classification created to hold development and planning registered mail lists.
D00-03	Building Code Guidance and Interpretation	T	Superseded	10	Archival Value: To Be Determined	New classification created to hold records relating to guidance and interpretation of the Building Code Act.

D02-07	Feed In Tariff (FIT) Applications	3	n/a	4	Destroy	New classification created to hold records relating to Feed In Tariff (FIT) applications for zoning issues surrounding solar farms, wind farms, and other large-scale environmental projects.
D06-03	Historic Land Use Inventory (HLUI) Applications	3	n/a	4	Archival Value: To Be Determined	New classification created to hold records relating to Historic Land Use Inventory (HLUI) Applications
D09-03	Heritage Confirmation Letters	3	n/a	4	Archival Value: To Be Determined	New classification created to hold City responses to requests for the heritage status of city properties received from members of the public.

F Finance

Classification Code	Records Classification Name	Years Active	Inactive Retention Trigger	Years Inactive	Final Disposition	Explanation of Changes
F03-11	Cash Handling Indemnity	T	Termination of employee, change of position / function	7	Destroy	New classification created to hold records relating to cash handling indemnity.
F04-39	Taxation Inquiries and Consultations	1	n/a	6	Archival Value: To Be Determined	New classification created to hold records relating to taxation inquiries and consultations.
F14-08	Standing Offer Call-ups	T	File closed	7	Destroy	New classification created to hold records relating to Standing Offer Call-ups - a new category of records created by Purchasing staff.

F14-09	Requisitions and Supporting Documentation	3	n/a	4	Archival Value: To Be Determined	New classification created to hold records and supporting documentation relating to Requisitions with a value over \$15k.
F18-06	Social and Affordable Housing	T	Grant completed or Agreement expiry	10	Archival Value: To Be Determined	Inactive retention period changed from "7 Years" to "10 Years" to align with business requirements.

G Governance and Corporate Management

Classification Code	Records Classification Name	Years Active	Inactive Retention Trigger	Years Inactive	Final Disposition	Explanation of Changes
G00-15	Lobbyist Contact and Correspondence	2	n/a	8	Archival Value: To Be Determined	New classification created to hold records relating to contact details and related correspondence between external Lobbyists and City staff. Inactive retention period also changed from "6 Years" to "8 Years" to align with business requirements.
G00-17	AODA Compliance Documentation	2	n/a	6	Archival Value: To Be Determined	New classification created to hold compliance documentation confirming City compliance with the Accessibility for Ontarians with Disabilities Act, 2015
G08-01	Senior Leadership Team	3	n/a	2	Permanent: Sent to City Archives	Classification name changed to reflect new corporate management structure following Citywide reorganization.
G08-02	Department Leadership Team	3	n/a	2	Permanent: Sent to City Archives	Classification name changed to reflect new corporate management structure following Citywide reorganization.

G08-03	Service Management Team	3	n/a	2	Permanent: Sent to City Archives	Classification name changed to reflect new corporate management structure following Citywide reorganization.
G11-01	Declaration of Interest / Record of Disclosure Registry	T	Conflict of interest eliminated or employee / elected rep terminated	Permanent	Permanent: Sent to City Archives	Classification name changed to enable inclusion of records related to the Record of Disclosure Registry.
G21	Municipal Friendship Agreements and Initiatives	n/a	n/a	n/a	n/a	Secondary classification created to accommodate records relating to municipal friendship agreements and initiatives formally declared under the (now closed) C16 Secondary.
G21-00	General	3	n/a	3	Archival Value: To Be Determined	Classification created to accommodate records relating to municipal friendship agreements and initiatives formally declared under the (now closed) C16-00.
G21-01	Special Friendship Agreements	T	Agreement completed	6	Permanent: Sent to City Archives	Classification created to accommodate records relating to municipal friendship agreements and initiatives formally declared under the (now closed) C16-01.
G21-02	Specific Municipal Friendship Initiatives	T	Project completed	6	Archival Value: To Be Determined	Classification created to accommodate records relating to municipal friendship initiatives.

H Human Resources

Classification Code	Records Classification Name	Years Active	Inactive Retention Trigger	Years Inactive	Final Disposition	Explanation of Changes
H02-03	Employee Driver History	T	Termination of employee	5	Destroy	Inactive Retention Period changed from "2 Years" to "5 Years" to align with business requirements.

I Information Management and Technology

Classification Code	Records Classification Name	Years Active	Inactive Retention Trigger	Years Inactive	Final Disposition	Explanation of Changes
I01-06	Records Updates and Disposition Approvals	1	n/a	Permanent	Permanent:: Sent to City Archives	Classification name changed from "Signed Records Destruction Reports" to "Records Updates and Disposition Approvals" to more accurately reflect records content.

R Recreation, Culture and Libraries

Classification Code	Records Classification Name	Years Active	Inactive Retention Trigger	Years Inactive	Final Disposition	Explanation of Changes
R00-01	Participants	T	Course, event concluded, membership expiry	2	Destroy	Inactive retention period changed from "1 Years" to "2 Years" to align with business requirements.

S Social and Health Programs

Classification Code	Records Classification Name	Years Active	Inactive Retention Trigger	Years Inactive	Final Disposition	Explanation of Changes
S00-02	Emergency Preparedness and Response Surveys	T	Survey completed	10	Archival Value: To Be Determined	New classification created to hold records relating to emergency preparedness and response surveys.
S00-03	OPH Emergency Responses	2	n/a	Permanent	Archival Value: To Be Determined	New classification created to hold records relating to Ontario Public Health (OPH) emergency responses.
S00-04	Food Recall Notifications	2	n/a	5	Archival Value: To Be Determined	New classification created to hold records relating to City efforts to notify City Shelters, Long-Term Care and Retirement Homes of food recall notifications issued by the Canadian Food Inspection Agency (CFIA).
S01-02	Healthy Babies/Healthy Children	T	Client's last visit + 4 Years	24	Destroy	Retention period changed from "Active=T (Client's last visit + 5 Years) / Inactive=23 Years" to "Active=T (Client's last visit + 4 Year) / Inactive=24" to align with business requirements.
S03-16	Healthy Sexuality Clinical Services	T	Client's last visit + 2 Years	Adults:13 Years / Children: Client's 18th birthday + 15 Years	Destroy	Retention Period changed from "Active=T (Case closed or Client's 18th birthday) / Inactive = 15 Years" to "Active=T (Last visit + 2 years) / Inactive=Adults:13 Years / Children: Client's 18th birthday + 15 Years"

S03-21	HIV, AIDS, HEP B/C and Syphilis - Adult Case Files	T	Client's last visit + 8 Years	7	Archival Value: To Be Determined	Classification name changed to better reflect records content. Retention period also changed from "Active=T (Case closed) / Inactive=60 Years" to "Active=Client's Last Visit + 8 Years / Inactive=7 Years" in compliance with College of Physicians & Surgeons of Ontario (CPSO) guidelines.
S03-23	HIV, AIDS, HEP B/C and Syphilis - Child Case Files	T	Client's 18 th birthday	15	Destroy	New classification created to hold records relating to Client (Child) HIV, AIDS, HEP B/C and Syphilis case files
S06-08	Tuberculosis Screenings	2	n/a	28	Destroy	New classification created to hold records relating to Tuberculosis screenings.
S07-05	Chlamydia, Gonorrhea - Adult Case Files	1	n/a	14	Destroy	New classification created to hold Client (Adult) Chlamydia / Gonorrhea case files.
S07-06	Chlamydia, Gonorrhea - Child Case Files	T	Client's 18 th birthday	15	Destroy	New classification created to hold Client (Child) Chlamydia / Gonorrhea case files.
S10-13	Ontario Renovates Program	T	Agreement expiry	10	Destroy	New classification created to hold records relating to applications for funding under the Ontario Renovates Program.
S10-14	Action Ottawa Projects	T	Agreement expiry	10	Archival Value: To Be Determined	New classification created to hold records relating to the development and construction of affordable housing rental units under the Action Ottawa Program.

S10-15	Home Ownership Program	T	Agreement expiry	10	Destroy	New classification created to hold records relating to applications for down-payment assistance by low income households for the purchase of homes under the Home Ownership Program.
S10-16	Rent Supplement – Landlord Statements	2	n/a	8	Archival Value: To Be Determined	New classification created to hold records relating to rent supplement - Landlord statements.
S10-17	Ministerial Approvals and Consents	2	n/a	5	Archival Value: To Be Determined	New classification created to hold records relating to ministerial approvals and consents.

T Transportation and Transit

Classification Code	Records Classification Name	Years Active	Inactive Retention Trigger	Years Inactive	Final Disposition	Explanation of Changes
T13-21	Stakeholder Relations	10	n/a	Permanent	Permanent: Sent to City Archives	Retention period changed from "Active=T (Project completed) / Inactive=20 Years" to "Active=10 Years / Inactive=Permanent" to align with business requirements.
T13-28	Contract Management - Other Projects	10	n/a	Permanent	Archival Value: To Be Determined	New classification created to hold contract management records managed by O-Train Construction (OTC) staff but that are not part of the LRT system proper.

W Water, Wastewater and Solid Waste

Classification Code	Records Classification Name	Years Active	Inactive Retention Trigger	Years Inactive	Final Disposition	Explanation of Changes
W08-12	Sewer Service Laterals	T	File closed	13	Destroy	Retention period changed from "Active=2 Years / Inactive = 13 Years" to "Active=T (File closed) / Inactive=13 Years" to align with business requirements.

Part 2: Final Disposition (Archival Value) Changes

D Development and Planning

Classification Code	Records Classification Name	Years Active	Inactive Retention Trigger	Years Inactive	Final Disposition	Explanation of Changes
D00-02	Development and Planning - Registered Mailing Lists	T	Superseded	10	Destroy	Final Disposition changed from "Archival Value: To Be Determined: to "Destroy" following completion of archival appraisal.
D02-07	Feed-In Tariff (FIT) Applications	3	n/a	4	Destroy	Final Disposition changed from "Archival Value: To Be Determined: to "Destroy" following completion of archival appraisal.
D03-02	Specific Community Plans (Minor)	T	File closed	10	Permanent: Sent to City Archives	Final Disposition changed from "Archival Value: To Be Determined" to "Permanent: Sent to City Archives" following completion of archival appraisal.
D13-01	Specific Building / Construction Permits	2	n/a	Permanent	Permanent: Remains Inactive	Following a reappraisal of this records series, the City Archives determined that records created under this classification would no longer be designated 'Archival'. The records will be retained permanently by the Office of Primary Interest due to ongoing Business / Operational requirements.
D13-02	Master Plan Files (footprints)	6	n/a	Permanent	Permanent: Remains Inactive	Following a reappraisal of this records series, the City Archives determined that records created under this classification would no longer be designated 'Archival'. The records will be retained permanently by the Office of Primary Interest due to ongoing Business / Operational requirements.

E Emergency and Protective Services

Classification Code	Records Classification Name	Years Active	Inactive Retention Trigger	Years Inactive	Final Disposition	Explanation of Changes
E01-41	Private Transportation Companies	2	n/a	3	Destroy	Final Disposition changed from "Archival Value: To Be Determined: to "Destroy" following completion of archival appraisal.

F Finance

Classification Code	Records Classification Name	Years Active	Inactive Retention Trigger	Years Inactive	Final Disposition	Explanation of Changes
F03-11	Cash Handling Indemnity	T	Termination of employee, change of position / function	7	Destroy	Final Disposition changed from "Archival Value: To Be Determined: to "Destroy" following completion of archival appraisal.
F04-34	Payments in Lieu - Invoicing	3	n/a	4	Destroy	Final Disposition changed from "Archival Value: To Be Determined: to "Destroy" following completion of archival appraisal.
F04-35	Payments in Lieu - Payments	3	n/a	4	Destroy	Final Disposition changed from "Archival Value: To Be Determined: to "Destroy" following completion of archival appraisal.
F04-36	Payments in Lieu - Recording and Reporting	3	n/a	4	Destroy	Final Disposition changed from "Archival Value: To Be Determined: to "Destroy" following completion of archival appraisal.
F08-29	Funeral Expense Recoveries	2	n/a	5	Destroy	Final Disposition changed from "Archival Value: To Be Determined: to "Destroy" following completion of archival appraisal.

F08-30	Developer Deposits	2	n/a	13	Destroy	Final Disposition changed from "Archival Value: To Be Determined: to "Destroy" following completion of archival appraisal.
F14-08	Standing Offer Call-ups	T	File closed	7	Destroy	Final Disposition changed from "Archival Value: To Be Determined: to "Destroy" following completion of archival appraisal.

G Government and Corporate Management

Classification Code	Records Classification Name	Years Active	Inactive Retention Trigger	Years Inactive	Final Disposition	Explanation of Changes
G20-00	General	3	n/a	3	Destroy	Final Disposition changed from "Archival Value: To Be Determined: to "Destroy" following completion of archival appraisal.
G21-01	Special Friendship Agreements	T	Agreement completed	6	Permanent: Sent to City Archives	Final Disposition changed from "Archival Value: To Be Determined: to "Permanent: Sent to City Archives" following completion of archival appraisal.

I Information Management and Technology

Classification Code	Records Classification Name	Years Active	Inactive Retention Trigger	Years Inactive	Final Disposition	Explanation of Changes
I01-01	CRCS/Records Retention and Disposition	T	New schedule completed	Permanent	Permanent: Remains Inactive	Final Disposition changed from "Permanent: Sent to City Archives" to "Permanent: Remains Inactive" following a reappraisal by archival staff. These records will be retained permanently by the Office of Primary Interest.

R Recreation, Culture and Libraries

Classification Code	Records Classification Name	Years Active	Inactive Retention Trigger	Years Inactive	Final Disposition	Explanation of Changes
R00-03	Fee Support	1	n/a	2	Destroy	Final Disposition changed from "Archival Value: To Be Determined: to "Destroy" following completion of archival appraisal.
R07-01	Horses Owned by the City	T	Death or departure of horse	1	Permanent: Sent to City Archives	Final Disposition changed from "Archival Value: To Be Determined: to "Permanent: Sent to City Archives" following completion of archival appraisal.
R07-02	Horses Boarded by the City	T	Death or departure of horse	1	Destroy	Final Disposition changed from "Archival Value: To Be Determined: to "Destroy" following completion of archival appraisal.
R10-05	Monuments Registry	2	n/a	Permanent	Permanent: Remains Inactive	Final Disposition changed from "Archival Value: To Be Determined: to "Permanent: Remains Inactive" following completion of archival appraisal.

S Social and Health Programs

Classification Code	Records Classification Name	Years Active	Inactive Retention Trigger	Years Inactive	Final Disposition	Explanation of Changes
S02-16	Opt4Jobs Program	T	Case closed	7	Destroy	Final Disposition changed from "Archival Value: To Be Determined: to "Destroy" following completion of archival appraisal.
S03-23	HIV,AIDS, HEP B/C and Syphilis - Child Case Files	T	Client's 18 th birthday	15	Destroy	Final Disposition changed from "Archival Value: To Be Determined: to "Destroy" following completion of archival appraisal.
S06-07	Children's Immunization Case Files	T	Client's 18 th birthday	10	Destroy	Final Disposition changed from "Archival Value: To Be Determined: to "Destroy" following completion of archival appraisal.
S06-08	Tuberculosis Screenings	2	n/a	28	Destroy	Final Disposition changed from "Archival Value: To Be Determined: to "Destroy" following completion of archival appraisal.
S07-05	Chlamydia, Gonorrhea - Adult Case Files	1	n/a	14	Destroy	Final Disposition changed from "Archival Value: To Be Determined: to "Destroy" following completion of archival appraisal.
S07-06	Chlamydia, Gonorrhea - Child Case Files	T	Client's 18 th birthday	15	Destroy	Final Disposition changed from "Archival Value: To Be Determined: to "Destroy" following completion of archival appraisal.
S10-13	Ontario Renovates Program	T	Agreement expiry	10	Destroy	Final Disposition changed from "Archival Value: To Be Determined: to "Destroy" following completion of archival appraisal.
S10-15	Home Ownership Program	T	Agreement expiry	10	Destroy	Final Disposition changed from "Archival Value: To Be Determined: to "Destroy" following completion of archival appraisal.

T Transportation and Transit

Classification Code	Records Classification Name	Years Active	Inactive Retention Trigger	Years Inactive	Final Disposition	Explanation of Changes
T05-11	Infrastructure Inquiries	1	n/a	14	Destroy	Final Disposition changed from "Archival Value: To Be Determined: to "Destroy" following completion of archival appraisal.
T08-04	Pedestrian Network Projects	T	Project completed	10	Permanent: Sent to City Archives	Final Disposition changed from "Destroy" to "Permanent: Sent to City Archives" following of a reappraisal by archival staff.

W Water, Waste Water and Solid Waste

Classification Code	Records Classification Name	Years Active	Inactive Retention Trigger	Years Inactive	Final Disposition	Explanation of Changes
W00-03	Operational Data Sheets	T	Superseded	5	Destroy	Final Disposition changed from "Archival Value: To Be Determined: to "Destroy" following completion of archival appraisal.
W05-11	Water Production Work Orders	1	n/a	6	Destroy	Final Disposition changed from "Archival Value: To Be Determined: to "Destroy" following completion of archival appraisal.
W21-02	Leachate Management	3	n/a	10	Permanent: Sent to City Archives	Final Disposition changed from "Archival Value: To Be Determined: to "Permanent: Sent to City Archives" following completion of archival appraisal.
W21-03	Landfill Gas Management	3	n/a	10	Permanent: Sent to City Archives	Final Disposition changed from "Archival Value: To Be Determined: to "Permanent: Sent to City Archives" following completion of archival appraisal.
W21-20	Orgaworld	20	n/a	7	Permanent: Sent to City Archives	Final Disposition changed from "Archival Value: To Be Determined: to "Permanent: Sent to City Archives" following completion of archival appraisal.