Medicine Hat College Procedure
APPLYING THE RECORDS RETENTION AND DISPOSITION SCHEDULE

Procedure #: PR-GA-05-01
Procedure Authority: Manager, Policy and Compliance
Executive Sponsor: Vice-President, Administration and Finance
Approved by: Vice-President, Administration and Finance
Effective Date: May 6, 2020

1. PURPOSE
This procedure outlines the steps to identifying MHC records and applying the Records Retention and Disposition Schedule (The Schedule).

2. SUPPORTING
- GA-05 Records and Information Management (the Policy)

3. DEFINITIONS
All terms used throughout these procedures shall have the meaning ascribed to as such under the Policy.

4. PROCEDURE

<table>
<thead>
<tr>
<th>ACTION</th>
<th>RESPONSIBILITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use the flowchart (Appendix A - Identifying MHC Records) to determine if the material in question is a MHC record or a non-record.</td>
<td>Employee</td>
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<tr>
<td>If you are managing a MHC record, use the Schedule (Appendix B – Records Retention and Disposition Schedule) to identify</td>
<td>Employee</td>
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<tr>
<td>i. the record series to which it belongs,</td>
<td></td>
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<tr>
<td>ii. the record custodian responsible for keeping the master copies of those records, and</td>
<td></td>
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<tr>
<td>iii. the retention and disposition requirements for the series.</td>
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<tr>
<td>If you have a non-record, apply ADM-14 retention rule on page ten of the Schedule.</td>
<td></td>
</tr>
<tr>
<td>Browse the Schedule by keyword or by function.</td>
<td>Employee</td>
</tr>
</tbody>
</table>

Keyword: to target your search to specific keywords such as department (e.g. Enrolment Services), subject (e.g. |
donations), or record type (e.g. meeting minutes), use “CTL + F” and type your keyword into the search box.

**Check all of the results** that are returned to ensure that you are applying the correct rule.

**Function:** begin with the college function to which the record in question pertains (i.e. why it was created?) to find the appropriate rule. There are eleven functions to choose from:

- ADM – Administration
- CAM – Campus Operations
- FCT – Facilities and Property
- FIN – Financial Management
- GOV – Governance
- HRS – Human Resources
- INF – Information Management and Technology
- LGL – Legal
- MKT – Marketing and Community Relations
- STS – Students
- TEA – Teaching

**All MHC records are created to support one of these broad business functions.** You can find descriptions of the functions on pages four and five of the Schedule.

If it is not immediately evident which function the record supports, begin by checking Administration (ADM). This function covers activities that are common to most departments.

Read through the series titles under the function you have selected. These categories represent the activities that produce records.

For more detail about the types of records that are included in each series, see the series descriptions and examples.

Determine which office is the record custodian. If your department is the custodian, follow the retention and disposition requirements. If another department is the custodian, destroy or return your copies once they are no longer useful.

**Duplicates must never be retained for longer than the official retention period.**

If your office is the record custodian of a series, decide which format (paper or electronic) is the master to be retained for the duration of the retention period. All other copies are considered duplicates.
Classify and store the record following your office’s guidelines.

Follow the disposition directions provided by the Schedule once the retention period has expired.

5. ADDITIONAL INFORMATION
   GA-05-01: Appendix A – Identifying MHC Records
   GA-05-01: Appendix B – Records Retention and Disposition Schedule

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Wayne Resch
Vice-President, Administration and Finance

Date: May 6, 2020

DOCUMENT HISTORY
January 2019 Procedure approved
May 2020 Revised procedure approved