

For the Record...

QUICK TIPS FOR APPLYING MUNCLASS RETENTION AND DISPOSAL SCHEDULES (RDS)

1. Determine the records class or record series for which you need retention guidance.

If you have a large amount of records you are trying to determine the retention period for, first break down the records into categories:

- Are the records all of one type? (i.e. invoices, timesheets, equipment catalogues)
- Are the records filed together in a series? (i.e. employee files, student files)

2. Check 'MUNCLASS' to find the retention and disposition requirements.

Retention requirements are grouped together according to the record class they represent. For example:

- if you have purchase orders, invoices, charge accounts, supporting documents, cheques and moving expenses, these all relate to the 'Finance' function of MUNCLASS and are part of the 'Accounts Payable' records class.
- if you have reason for absence forms, reporting forms for paid time off, and forms for temporarily adjusted workloads, these all relate to the 'Human Resources' function of MUNCLASS and are part of the 'Work Schedules and Absences' records class.
- if you have media clips, briefing material, media contact lists, communications plans and speeches, these all relate to the 'External Relations' function of MUNCLASS and are part of the 'Communications' records class.

3. Once you have determined the Function and Record Class that the records relate to, check the retention rules attached to that function.

- Reference the columns 'Retention' and 'Disposition' in the MUNCLASS plan for retention and disposal information.
- The retention rules will indicate:
 1. how long to keep records
 2. when to dispose of records
 3. how to dispose of records

If no retention rules are listed for the records you are looking for, contact [Information Management and Protection](#).

Disposition Methods

- **Selective Retention:** a disposition of 'Selective Retention' indicates that the University has identified the records to be of potential long-term historical value to the University. Units should contact the University Archivist to notify them that records are ready for review once the retention period has expired. The Archivist will review the records and may decide to retain some or all of the records in the University Archives. Once the records have been reviewed, the Archivist will direct the unit regarding disposition.
- **Destroy:** a disposition of 'Destroy' indicates that the records can be disposed of by a number of different means: deleted, recycled or securely shredded.

For the Record...

Destruction Form

For all records destroyed pursuant to MUNCLASS RDS, units must complete a [Records Destruction Form](#), have it signed by a senior person within the unit, and retain it permanently for their records.

The contents of completed destruction forms should not contain personal information or matters sensitive to the University. Records that contain personal or confidential information must be destroyed in such a way that their contents cannot easily be reconstructed.

Important Note: *MUNCLASS RDS must not be used as the authority to destroy any records pertaining to an ongoing or reasonably anticipated investigation, legal action or proceeding, Access to Information and Protection of Privacy (ATIPP) request, grievance audit or program review. This holds true even if the retention period or disposition date specified for the records has already expired.*