

City of Charlottetown
A Bylaw to Amend the Records Retention & Disposal Schedule Bylaw
Bylaw # 2020-RR-01A

BE IT ENACTED by the Council of the City of Charlottetown as follows:

PART I – INTERPRETATION AND APPLICATION

1. Title

- 1.1. This bylaw shall be known and cited as the “Records Retention & Disposal Schedule Amendment Bylaw.”

2. Purpose

- 2.1. The purpose of this bylaw is to amend the City of Charlottetown’s Records Retention & Disposal Schedule Bylaw to replace the multi-page Records Retention schedule due to documented errors and omissions in the original schedule outlined in the Records Retention Regulations of PEI.

3. Authority

- 3.1. Pursuant to Part 5, Section 134 (1) – Revision of Bylaws of the Municipal Government Act R.S.P.E.I. 1988, Cap. M-12.1.

4. Definitions

- 4.1. In this bylaw, any word and term that is defined in *the Municipal Government Act, the Records Retention Regulations of PEI and the City of Charlottetown Records Retention & Disposal Schedule Bylaw* has the same meaning as in that Act, Regulations or Bylaw.

5. Schedule “A” – of the City of Charlottetown Records Retention & Disposal Schedule Bylaw is hereby amended by the following:

- 5.1. All pages contained within Schedule ‘A’ Records Retention Schedule be replaced with the revised Schedule ‘A’ as attached.

PART II – APPROVAL AND ADOPTION

6. Effective Date

6.1. This Records Retention & Disposal Schedule Amendment Bylaw, #2020-RR-01A shall be effective on the date of approval and adoption below.

First Reading:

This Records Retention & Disposal Schedule Amendment Bylaw, #2020-RR-01A was read a first time and approved by a majority of members present at the Council meeting held on the 12th day of April, 2021.

Second Reading:

This Records Retention & Disposal Schedule Amendment Bylaw, #2020-RR-01A, was read a second time and approved by a majority of members present at the Council meeting held on the 10th day of May, 2021.

Approval and Adoption by Council:

This Records Retention & Disposal Schedule Amendment Bylaw, #2020-RR-01A was adopted and approved by a majority of Council members present at the Council meeting held on the 10th day of May, 2021.

7. Witness the corporate seal of the City of Charlottetown.



Mayor (Signature Sealed)



Chief Administrative Officer (Signature Sealed)

This Records Retention & Disposal Schedule Amendment Bylaw, #2020-RR-01A adopted by the Council of the City of Charlottetown on the 10th day of May, 2021 is certified to be a true copy.



Chief Administrative Officer

May 11, 2021

Date

(Attachment)
Schedule 'A'

RECORDS RETENTION SCHEDULE:

Note: The subject matter is listed alphabetically followed by a retention period. The retention period is identified either as "PERMANENT" or expressed as a number of years. Retention periods are labelled as:

(a) CY - a retention period that concludes after the end of a calendar year (i.e. after December 31st of a given year).

(b) FY - a retention period that concludes after the end of a fiscal year as established in section 149 of the *Municipal Government Act*.

(c) closed after information is superseded (replaced or take the place of) or obsolete (no longer in use) (S/O)

In the event of a conflict between this schedule and the *Municipal Government Act* Records Retention Regulations, the Regulations shall apply.

SUBJECT	DESCRIPTION	RETENTION PERIOD (YEARS)	ENDS
Accountants	Working Papers	7	FY
Accounts	Paid (summary sheet)	7	FY
	Payable vouchers	7	FY
	Receivable duplicate invoices	7	FY
Administration	Reports (not part of Minutes)	7	CY
Advertising	Electoral	4	CY
	Other notices- MGA, other legislation	2	CY
Agendas	Part of Minutes	PERMANENT	
Agreement	General	12	S/O
	Development	12	S/O
	Major legal	12	S/O
	Minor legal	12	S/O
Annexations	Correspondence	7	CY
	Final Order	PERMANENT	
Annual Reports	Council, Boards, Commissions	5	CY
Applications	Development permit	2	CY
	Site plan approval	2	CY
	Subdivision (after final approval)	3	CY
	Part-time employees (after end of employment)	1	CY
Appointments	Other than those in Minutes	3	FY
Assessment	Rolls	PERMANENT	
	Duplicate roll	7	FY
Assets	Asset Management Inventory	20	S/O
	Records of surplus	7	FY
	Temporary files	2	FY
Bank	Deposit books	7	FY
	Deposit slips	7	FY
	Memos (credit/debit)	7	FY
	Reconciliations	2	FY

	Statements	7	FY
Boards	Minutes	PERMANENT	S/O
	Authority & Structure	5	CY
	Correspondence	5	CY
Briefings/Reports	To Council	7	CY
Budgets	Operating (in minutes)	PERMANENT	
	Capital (in minutes)	PERMANENT	
	Working papers	3	FY
Bylaws	All	PERMANENT	
Cash	Receipts journal	7	FY
	Disbursements journal	7	FY
	Duplicate receipts	7	FY
Certificates	of Title	PERMANENT	
Census	Reports	12	CY
Cheques	Cancelled (paid)	7	FY
	Register	7	FY
	Stubs	7	FY
Claims	Notice of	12	S/O
	Statements of	12	S/O
Committee	Minutes	PERMANENT	
Compensation	Records	10	FY
Contracts	Files (completion of)	12	S/O
	Forms	12	FY
	Major legal	12	S/O
	Minor legal	12	S/O
Council	Minutes	PERMANENT	
Court Cases		12	S/O
Destroyed Records	Index	PERMANENT	
	Signed destroyed	PERMANENT	
	records statements		
Documents	Not part of bylaws	12	S/O
	Agreements, major legal	12	S/O
	Agreements, minor legal	12	S/O
	Contracts legal	12	S/O
	Easements	12	S/O
	Funding agreements	12	S/O
	Leases (after expiration)	12	S/O
	Notices of change of land titles	12	S/O
Elections	All election documents other than ballot box contents	4	CY
	Ballot box contents	In accordance with the MGA	CY
	Campaign disclosure statement	7	CY
Engineering	Drawings	PERMANENT	
Employee Benefits	Health, Dental, etc.	5	CY
Employees	Seasonal/Casual Job applications (not hired)	1	CY

	Job descriptions	PERMANENT	
	Oaths of Office	1 (after position vacated)	CY
	Personnel file	7 (after cessation of employment) or 12 (after dismissal)	CY
	WCB Claims	7 (after cessation of employment) or 12 (after dismissal)	CY
Financial Statements	Interim	10	FY
	Working papers	7	FY
	Final	12	FY
Franchises		PERMANENT	
Income Tax	Deductions	7	CY
	TD1	7 (after cessation of employment)	CY
	T4	7 (after cessation of employment)	CY
	T4 Summaries	7	CY
Inquiries	From the public	3	CY
Insurance	Claims	12 (after settled)	FY
	Records (after expiration)	12	FY
Land	Appraisals	1 (after sold)	
Leases	After expiration	7	S/O
Legal	Opinions	12	S/O
	Proceedings	12	S/O
Legislation	Acts (after superseded)	1	CY
Licenses	Applications	3	CY
	Business (after expired)	5	CY
	Literature	2	CY
Local Improvements	Records	PERMANENT	
Maps	Base (original)	PERMANENT	
	Contour	PERMANENT	
Maintenance Reports		12	CY
Monthly Reports	Road	5	FY
Municipal Affairs	Annual reports	5	FY
Organization	Structure and records	2	S/O
Payroll	Garnishees	7 (after garnish is removed)	CY
	Individual earning records	7	CY
	General Journals	7	CY
	Timecards	7	CY
	Timesheets – daily	7	CY
	Timesheets – weekly	7	CY
	Company Registers	7	CY
	Employment Insurance	7 (after cessation of employment)	CY
Permits	Development	12	S/O
Petitions		10	CY

Plans	Amendment applications	5	CY
	Official	PERMANENT	
	Amendments	PERMANENT	
	Subdivision	PERMANENT	
Policy	After superseded	5	CY
Progress Reports	Project	5	CY
	Under contract (final payment)	7	S/O
Property Files		Until sold +10	FY
Prosecution	All	12	S/O
Publications	Local reports	3	CY
Purchase	Land	Until Sold +12	FY
Receipts	Books	7	FY
	Duplicate cash	7	FY
	Registration	7	FY
Receptions & Special Events (non-historic)		3	CY
Reports	Accident	12	S/O
	Accident statistics	12	S/O
	Field	12	S/O
	Inspection	12	CY
Requisitions	Copies	2	FY
	Duplicate	7	FY
	Paid	7	FY
Resolutions	Minutes	PERMANENT	
Subdivision	After Final Approval	12	CY
Taxes	Municipal Credits	7	FY
	Rolls	PERMANENT	
Termination	Employees	7 (after cessation of employment) or 12 (after dismissal)	CY
Tenders	Files	12	FY
	Successful	12	FY
	Purchase Quotations	12	FY
	Unsuccessful	10	FY
Traffic	Streets	7	CY
Training and Development Files		5	CY
Trial Balances	Monthly	5	FY
	Year End	7	FY
Vendors	Correspondence	2	FY
	Contracts	12	FY
	Suppliers Files	12	FY
Vouchers	Duplicate	7	FY
Weed Control Reports	Until updated	1	CY
Zoning	Amendment applications	5	CY
	Bylaws	PERMANENT	
	Bylaw Enforcement	5	CY



**CITY OF CHARLOTTETOWN
RECORDS RETENTION & DISPOSAL SCHEDULE BYLAW
AMENDING BYLAW #2020-RR-01A**

To amend the City of Charlottetown's Records Retention & Disposal Schedule Bylaw to replace the multi-page Records Retention schedule due to documented errors and omissions in the original schedule outlined in the Records Retention Regulations of PEI.

RESOLVED: THAT the bylaw to amend the "CITY OF CHARLOTTETOWN RECORDS RETENTION & DISPOSAL SCHEDULE BYLAW" be read a **first** time.

Moved by Councillor [Signature] Alanna Jankov

Seconded by Deputy Mayor Jason Coady Jason Coady
Date: April 12, 2021

(Carried)
10-0 PM

RESOLVED: THAT the bylaw now be approved as a City Bylaw and that it be entitled the "CITY OF CHARLOTTETOWN RECORDS RETENTION & DISPOSAL SCHEDULE BYLAW" and that it be read a second time at the next public meeting of Council.

Moved by Councillor [Signature] Alanna Jankov

Seconded by Deputy Mayor Jason Coady Jason Coady
Date: April 12, 2021

(Carried)
10-0 PM

THEREFORE, BE IT RESOLVED: THAT the "CITY OF CHARLOTTETOWN RECORDS RETENTION & DISPOSAL SCHEDULE BYLAW" be read a **second** time and that the said Bylaw be now approved and adopted.

Moved by Councillor [Signature] Alanna Jankov

Seconded by Deputy Mayor Jason Coady Jason Coady
Date: *May 10, 2021*

(Councillor Tweed absent)
9-0
Carried
PM

This Records Retention & Disposal Schedule Amending Bylaw, #2020-RR-01A, was adopted by a majority of Council members present at the Council meeting held on 10th day of May, 2021.

[Signature]
Peter Kelly, CAO

[Signature]
Philip Brown, Mayor