

OP2330 ARCHIVES PUBLIC SERVICES

Records documenting the services offered at the University Archives to the university community and general public.

Includes administration of daily public services and management of user information.

Example documents include but are not limited to retrieval request forms, loan agreements, display agreements, letters of permission, reproduction requests forms, credit card authorization forms, user registration cards, and patron database.

University Records exist in both physical and electronic formats, such as paper, email or data in a database. Paper records may or may not contain information that is duplicated in an electronic system. For technical reasons the retention assigned to the electronic records may be different from the retention of physical records. If there are differences, see instructions in this schedule for details.

OPR - University Archives

(Unless otherwise assigned, see below)

NO.	TYPE OF RECORD	Active yr(s)	Semi-Active	Dis-position	Personal Info
31	Collection Access Files	ET + 1	2	D	YES
<i>Records consist of retrieval request forms, loan agreements, display agreements, letters of permission and so on.</i>					
<i>ET Definition: Activities concluded or agreements expired.</i>					
Retention Rationale: Limitations Act, 2002, S.O. 2002, c. 24, Sched. B s. 4. states that unless this Act provides otherwise, a proceeding shall not be commenced in respect of a claim after the second anniversary of the day on which the claim was discovered.					
32	Reproduction Services Files	FY + 1	0	DP/D	YES
<i>Records consist of order forms, copies of credit card authorization forms and copies of invoices.</i>					
<i>Disposition Plan: Copies of credit card authorization forms to be destroyed after two months. The rest of the files to be destroyed according to the schedule.</i>					
Retention based on anticipated operational use.					

GLOSSARY

FY = Fiscal Year (May 1 to April 30)

AY = Academic Year (September 1 to August 31)

CY = Calendar Year (January 1 to December 31)

ET = Event Trigger

OPR = Office of Primary Responsibility

DP = Special Disposition Plan

AR = Transfer to Archives

D = Destroy / Delete

PIB = Personal Information Bank

NO.	TYPE OF RECORD	Active yr(s)	Semi-Active	Dis-position	Personal Info
40	User Registration and User Database	ET + 0	0	DP/D	PIB
<p><i>Records consist of user registration cards and user database. The following personal information is collected: name, address, email, phone number and institutional or other affiliation.</i></p> <p><i>ET Definition: Database migrated or no longer used.</i></p> <p><i>Disposition Plan: Paper user registration cards to be destroyed one year after data on the cards were entered into the database.</i></p> <p>Retention based on anticipated operational use.</p>					

This schedule applies to official records. Convenience or duplicate copies of official records should not be kept longer than necessary, and in no event longer than the official copy.

GLOSSARY

FY = Fiscal Year (May 1 to April 30) DP = Special Disposition Plan
 AY = Academic Year (September 1 to August 31) AR = Transfer to Archives
 CY = Calendar Year (January 1 to December 31) D = Destroy / Delete
 ET = Event Trigger PIB = Personal Information Bank
 OPR = Office of Primary Responsibility

OP2330 was approved on 04/04/2017.