

POLICY

Town of Mount Moriah

Records and Retention Policy

PURPOSE Policy of the Town of Mount Moriah for the safe record keeping and retaining of important documentation of the town as well as the schedule of necessary disposal of expired documents.

AUTHORITY As per resolution at Meeting No. 068 held June 2, 2021 and further to Section 215 of Municipalities Act, 1999.

DOCUMENTS AVAILABLE FOR PUBLIC VIEWING

Section 215 of the Municipalities Act, 1999 states that the following documentation is available for public inspection:

- a) Adopted minutes of council
- b) Assessment Rolls
- c) Regulations
- d) Municipal Plans
- e) Opened Public tenders
- f) Financial Statements
- g) Auditor's Report
- h) Adopted Budgets
- i) Contracts
- j) Orders
- k) Permits
- l) All other documents tabled or adopted by council at a public meeting

RETENTION AND DISPOSAL

The following schedule will be adhered to the retention and disposal of all documentation for the Town of Mount Moriah.

No.	Item	Retention (in years from the date that the document was created)
	<u>ACCOUNTING</u>	
1	Annual Financial Statements	Permanent
2	Bank Statements	7
3	Bank Reconciliation Statements	7
4	Cash Receipts	7
5	Cheque Stubs and or duplicates	7
6	Daily Cash Reports and Summaries	7
7	Deposit Books	7
8	Federal and Provincial Remittance Forms	7
9	General Ledgers and Journals	7
10	Invoices including tax notices and utility billings	7
11	Purchase Orders	7
12	Assessment Rolls	Permanent
13	Payroll Records	SAME AS ITEM No. 31
14	Change of Ownership Documents	Permanent
15	Tax Certificates	Permanent
	<u>ADMINISTRATION</u>	
16	Appeals under the Planning Act	7
17	Assessment Appeals	7
18	Assessor's Valuation Reports	7

19	Insurance Policies after policy has expired	3
20	Permits	Permanent
21	Photographs	Permanent
22	Tax enforcement records after tax title property has been sold	7
23	Tax lien withdrawal forms	7
	<u>AGREEMENTS & CONTRACTS</u>	
24	Agreements and supporting documentation	Permanent
	<u>CORRESPONDENCE</u>	
25	From residents regarding taxes, property concerns or complaints	Permanent
26	Any other correspondence not relevant to the town history of properties	3
27	Historical documents	Permanent
28	Government correspondence relating to Capital Works projects	Permanent
29	General Government correspondence not relevant to the town history	7
30	Petitions	7
	<u>EMPLOYER-EMPLOYEE AND UNION</u>	
31	Employee records after termination, resignation or retirement	10
	<u>LEGAL</u>	
32	Minister's Orders	Permanent
33	Notices of Claim (upon completion)	10
34	Statements of Claim	10

	<u>MINUTES/BYLAWS</u>	
35	Minutes of regular and special meetings	Permanent
36	Minutes of Committee Meetings	Permanent
37	Recordings of meetings	Permanent

NOTE: All documents tabled for disposal are to be shredded. All disposals will take place from December 15 to February 15 of each calendar year.

Policy to be tabled for review for the first meeting of December in every calendar year.

Date last reviewed: June 2, 2021

Meeting Date and Number: June 2, 2021 - 068

Verified by: Lisa Duffrey Hunt