

THE CORPORATION OF THE TOWNSHIP OF HILTON

BY-LAW NO. 1468-25

Being a by-law to establish schedules of retention periods for documents, records, and other papers of the Municipality.

**WHEREAS** Subsection 254(1) of the *Municipal Act, 2001* (the “Act”) provides that a municipality shall retain and preserve the records of the municipality and its local boards in a secure and accessible manner and, if a local board is a local board of more than one municipality, the affected municipalities are jointly responsible for complying with subsection 2001, c.25 s.254 (1);

**AND WHEREAS** Subsection 255(1) of the *Municipal Act, 2001*, S.O. 2001 c.25 (the “Act”) as amended provides that except otherwise provided, a record of the municipality or local board may only be destroyed in accordance with section. 2001, c. 25 s.255 (1);


**AND WHEREAS** Subsection 255(2) of the *Municipal Act, 2001*, states that despite Section 254, a record of a municipality or a local board may be destroyed if a retention period for the record has been established under this section and a), the retention period has expired; or b) the record is a copy of the original record. 2001, C.25, s.255 (2); 2006, c. 32, Schedule A. S. 109 (1); and

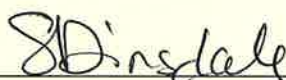
**AND WHEREAS** in accordance with Subsection 255(3) a municipality may establish retention periods during which the records of the municipality and local boards of the municipality must be retained and preserved in accordance with section 254. 2001, C.25 2.255 (3).

**NOW THEREFORE** the Council of the Corporation of the Township of Hilton enacts as follows:

1. **THAT** the Retention Periods for the records of the Township of Hilton attached hereto as “Schedule A” and forming part of this by-law, are hereby adopted.
2. **THAT** the Clerk has the authority to destroy all documents provided they have been retained until the retention period outlined in “Schedule A” has expired.
3. **THAT** the Clerk is required to make a record of documents destroyed.
4. **THAT** Schedule “A” is amended to include transitory records.
5. **THAT** this by-law shall come into force and effective the date of passing.
6. **THAT** By-law 1349-22 is hereby rescinded.

Read a first, second and third time and finally passed this 13<sup>th</sup> day of August 2025.

  
Dave Leask, Deputy Reeve

  
Sara Dinsdale, CAO/Clerk-Treasurer

## ADM - Administration Management

| CLASSIFICATION CODE | ACTIVITY   | DESCRIPTION  | TRIGGER                | RETENTION PERIOD | NOTE   |
|---------------------|--|--|------------------------|------------------|--|
| ADM                 |  | Records related to administrative processes and activities including access and privacy, administrative support, meetings and event participation, processes and performance management.   |                        |                  |  |
| ADM01               | Delegation of Authority  | Records related to the delegation or assignment of authority.  | File Closed Date       | 7 Years          | File Closed Date - Superseded or Obsolete    |
| ADM02               | Forms and Templates  | Includes all blank templates and forms created and/or used by the municipality.  | File Closed Date       | 1 Year           | File Closed Date - Superseded or Obsolete    |
| ADM03               | Associations/ Organizations/ Societies/Committees Participation - External | Records related to association, organizations, societies and Committees to which staff belong to or with which they communicated in the course of their duties. Records can include: annual reports, newsletters, bylaws, meeting minutes and agendas. | Calendar Year End Date | 2 Years          | Includes APH, ADSAB & other related agencies |
| ADM04               | Departmental Meetings  | Records include minutes, reports, notice of meetings and agendas for Departmental meetings.  | Calendar Year End Date | 4 Years          |  |

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|-------|--|---|------------------|---------------------------|---|
| ADM05 | Policies, Procedures, Standards and Guidelines | Records include Departmental policies, procedures, standards, guidelines and operating manuals, checklists, and informal departmental workflow process documentation used to document tasks and activities. | File Closed Date | Not Specified - Must Keep | File Closed Date - Superseded or Obsolete |
| ADM06 | Statistical Reports                            | Records regarding the preparation of statistics such as Departmental activity reports.  | Report Date      | 2 Years                   |   |
| ADM07 | Accssibility Requests & Correspondence         | Records & related correspondence in regard to requests for accomodation made by residents.  | Report Date      | 5 Years                   |   |
| ADM08 | Birth & Death Certificates                     | Records in regard to birth and death certificates.  | Date Received    | P                         |   |

AST - Asset Management & Maintenance

| CLASSIFICATION CODE | ACTIVITY          | DESCRIPTION  | TRIGGER                | RETENTION PERIOD  | NOTE |
|---------------------|-------------------|--|------------------------|---|------|
| AST                 |                   | Records related to the management and maintenance of physical assets including property maintenance, the operation of equipment and facilities, and the physical security of buildings and property.   |                        |   |      |
| AST01               | Parks Maintenance | Record related to landscaping, design and maintenance of parks, playgrounds and trails such as descriptions and layouts, maintenance scheduling, cycle paths, irrigation and other maintenance activities.   | Calendar Year End Date | Park maintenance = 5**, Playground equipment = 15 Years |      |
| AST02               | Equipment         | Records regarding the maintenance of owned or leased equipment or apparatus that is not part of an internal building primary mechanical and supply system such as serial numbers, technical specification manuals for the operation of the equipment, specifications, calibration records, installation instructions and maintenance activities. | Disposal of Equipment  | 1 Year  |      |

|              |                                   |  |                                     |                              |  |
|--------------|-----------------------------------|--|-------------------------------------|------------------------------|--|
| <b>AST03</b> | Fleet Management                  | Records regarding the maintenance of all vehicles owned or leased by the municipality. Records can include: work orders, registrations, inspection check lists, repair orders and disposal.  | Disposal of vehicle or end of lease | Not specified, must maintain |  |
| <b>AST04</b> | Building Maintenance              | Records regarding the maintenance of municipal building such as: the monitoring and maintenance of building structures, recreational facilities and internal property systems including heating and cooling (HVAC, etc.), pool and arena plant systems, elevating devices, power, wiring, plumbing and alarms. Records may include building layouts for equipment, lighting, plumbing, power and ceiling conduits. Records may also include the maintenance and Operational Management manuals for building infrastructure, inspection and monitoring reports and logs, deficiency reports, asbestos audit testing, building condition reviews, status reports, preventative and maintenance monitoring. | Calendar Year End Date              | 10 Years                     |  |
| <b>AST05</b> | Planning, Design and Construction | Records regarding the management of construction and renovation projects for the municipal buildings such as project specifications, project schedules, status reports, site photographs, change requests, contract compliance monitoring, permits and vendor and contractor liaison.  | Project Closed Date                 | P                            |  |

|              |   |   |                  |          |   |
|--------------|---|---|------------------|----------|---|
| <b>AST06</b> | Building Drawings                               | Records include drawings and plans regarding the structure of any building owned by the municipal, including mechanical and electrical systems, structural plans, architectural layouts and blue prints and specifications for any new builds, upgrades or additions. | File Closed Date | P        | E = superseded or life of asset/system                            |
| <b>AST07</b> | Building & Property Security                    | Records regarding the protection of the municipal property such as key lists, vandalism reports and other protection measures.  | Originating      | 5 Years  |   |
| <b>AST08</b> | Bridges & Bridge Reports                        | Includes all bi-annual bridge reports, bridge restrictions, engineer recommendations & reviews  | File Closed Date | 15 years |   |
| <b>AST09</b> | Entrance Permits                                | Includes all culvert placements, inspections, repairs, replacements and any related inquiries.  | File Closed Date | P        | *Where applicable, a copy is kept in the roll file for reference* |
| <b>AST10</b> | Roads Opening & Closures                        | Includes all records relating to roads opening & closures, including related correspondence.  | File Closed Date | 3 Years  |   |
| <b>AST11</b> | Roads Design Construction & Contracted Projects | Includes all records relating to roads construction projects, progress reports, and related correspondence. Includes roads engineer drawings.   | File Closed Date | 7 Years  |   |
| <b>AST12</b> | Roads Needs Assessment                          | Records for roads needs assessment, related roads recommendations from RWF and engineers. Includes all related roads data including ratings and valuations  | File Closed Date | P        |   |
| <b>AST13</b> | Roads Maintenance                               | Records in regard to roads maintenance, winter maintenance (incl Roads salt & sand), and winter road notices  | File Closed Date | 7 Years  | *Where applicable, a copy is kept in the roll file for reference* |

COM - Communication Management

| CLASSIFICATION CODE | ACTIVITY                      | DESCRIPTION   | TRIGGER                | RETENTION PERIOD | NOTE                   |
|---------------------|-------------------------------|---|------------------------|------------------|------------------------|
| COM                 |                               | Records related to the municipality's relationship with the community and other stakeholders. Includes communication production and coordination, external communication such as speeches and communications and relationship management.   |                        |                  |                        |
| COM01               | Corporate Identity & Branding | Records regarding the municipality's design elements, logos, watermarks, visual identity standards used for signage, letterhead and branded material other means of identifying the municipality.   | File Closed Date       | P                | Superseded or Obsolete |
| COM02               | Design Coordination           | Records include graphic design and production execution planning, layouts, and graphics use to create promotional material and advertising for the municipality.  | Calendar Year End Date | 7 Years**        | ** - archive review    |
| COM03               | Media Analytics               | Records related to media, web and social media research and analytics such as media monitoring results, and usage data tracking and analysis.   | Calendar Year          | 5 Years **       | ** - archive review    |
| COM04               | Media Content Management      | Records related to content and messages distributed through various external media channels such as the internet and social media platforms. Includes content posted to websites <b>not included municipally managed websites or social media</b> , posting status and checklists, and website snapshots. | File Closed Date       | P                | Superseded or Obsolete |



|              |                                    |  |                        |                 |   |
|--------------|------------------------------------|--|------------------------|-----------------|---|
| <b>COM05</b> | Communications                     | Records include final version of published or distributed information and materials such as promotional material, information packages, brochures, advertisements and newsletters.   | File Closed Date       | 1 Year          | Superseded or Obsolete                                  |
| <b>COM06</b> | Speeches & Presentations           | Records include background notes and final versions of speeches, presentations and news conferences given by elected and non-elected officials. <b>Includes notes &amp; slide decks from conferences and seminars</b>  | Calendar Year End Date | 7 Years**       | ** - archive review                                     |
| <b>COM07</b> | Heritage Preservation              | Records include photographs, artifacts, inventories and other records regarding the history of the municipality and surrounding municipalities.  | File Closed Date       | P               | File Closed Date = removal of designation               |
| <b>COM08</b> | Community Organizations            | Records related to formal communication in the course of staff duties with community organizations regarding advocacy, joint initiatives, and information sharing such as correspondence, background information, communication summaries and participation details. | Calendar Year End Date | 2 Years         |   |
| <b>COM09</b> | Fundraising                        | Records related to the raising of funds and donations for municipality-run programs.   | Calendar Year End Date | 2 Years         |   |
| <b>COM10</b> | Public Relations                   | Record related to the promoting relationships with the media such as key messaging, press releases, community announcements and correspondence with media.   | Calendar Year End Date | 7 Years         |   |
| <b>COM11</b> | Community Inquiries and Complaints | Includes records regarding inquiries, comments, congratulations and complaints received. Include the municipality's response to questions asked through media and email messages   | File Closed Date       | 5 Years **      | E = Resolution of inquiry or complaint, closure of file |
| <b>COM12</b> | Website and Social Media Content   | Includes all social media posts, information, postings and updates.  | File closed Date       | Once Superseded |   |



| CSS - COMMUNITY SUPPORT SERVICES |                                       |   |                        |                                     |   |
|----------------------------------|---------------------------------------|---|------------------------|-------------------------------------|---|
| CLASSIFICATION CODE              | ACTIVITY                              | DESCRIPTION   | TRIGGER                | RETENTION PERIOD                    | NOTE  |
| CSS                              |                                       | Records related to the municipality's delivery of Services to its community members.  |                        |                                     |   |
| CSS01                            | Family and Community Support Services | Records related to the family and community support services that enhances the social well-being of individuals and families through promotion or intervention strategies as permitted under the Family and Community Support Service Act.  | File Closed Date       | Not specified, shall prepare/submit | Superseded or Obsolete                        |
| CSS02                            | Heritage Designation                  | Records related to the identification, designation and conservation of buildings, structures and natural resources that are of historical significance such as heritage studies, registers of sites of cultural and historical interest and documentation used to identify the appropriateness of a heritage designation. | File Closed Date       | P                                   |   |
| CSS03                            | Cemetery Records                      | Includes records related to interment, burial records, maintenance records, annual BAO reports, lots sales, etc.  | Calendar Year End Date | P                                   |   |
| CSS04                            | Special Community Events              | Records regarding special community events such as: Canada Day, etc.  | Calendar Year End Date | 7 Years**                           | ** - archive review                           |
| CSS05                            | Facilitations & Historical Archives   | Records include photographs, artifacts, inventories and other records regarding the history of the municipality and surrounding municipalities. Includes family archives, family events, historical information within the Township. Media Clips, stories, and other historical information.                              | Calendar Year End Date | P**                                 | ** Filed digitally and in historical binders. |
| CSS06                            | Engagements                           | Records related to public engagements.  | Calendar Year End Date | 5 Years                             |   |
| CSS07                            | Vulnerable Sector Registry            | All records related to vulnerable sector registry, including personal information.  | Calendar Year End Date | 1 Year                              |   |
|                                  |                                       |   |                        |                                     |   |

| DEV - COMMUNITY PLANNING AND DEVELOPMENT |  |   |                        |                  |  |
|--|--|---|------------------------|------------------|--|
| CLASSIFICATION CODE                      | ACTIVITY                                 | DESCRIPTION   | TRIGGER                | RETENTION PERIOD | NOTE   |
| DEV                                      |  | Records related to the growth and development of the municipality including the Statutory Plans and buiding and development permits.  |                        |                  |  |
| DEV01                                    | Building and Fire Inspections            | Records regarding inspections of commercial, industrial and institutional properties.   | File Closed Date       | P                | File Closed Date = Date of Passed Inspection, life of system                     |
| DEV02                                    | Development Permits and Building Permits | Records related to development and building permit applications, supporting documents, and copies of approvals. Includes copies of all building permit inspection reports.Includes all septic,private water systems & public health approvals | File Closed Date       | P                | File Closed Date = Superseded/Obsolete, Excludes actual data residing on systems |
| DEV03                                    | Residential Development                  | Records relating to planning and development applications and requests to develop, build or renovate such as applications, supporting documentation including plans and reports, approvals and development permits issued.                    | File Closed Date       | 10 Years **      | File Closed Date = Date of Application   |
| DEV04                                    | Economic Development                     | Records regarding the promotion and development of industry and commerce in the municipality including inquiries and business profiles.   | Calendar Year End Date | 10 Years **      | ** - archive review  |

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| <b>DEV05</b> | Annexation/ Amalgamation                                    | Records pertaining to the annexing and amalgamating of land adjacent to the municipality's lands to accommodate growth.  | File Closed Date | P          | Superseded or Obsolete   |
| <b>DEV06</b> | Rights-of -Way, Licence of Use, Easements and Encroachments | Records regarding Rights-of-Way, Easements, licensing and encroachment agreements concerning ownership of private lands in order to maintain community services such as water and sewer lines that cross private property.   | File Closed Date | 6 Years ** | File Closed Date = termination of right, license and easement ** - archive review                        |
| <b>DEV07</b> | Maps and Mapping  | Records regarding maps and geospatial mapping components including maps relating to community facilities, zoning, electoral boundaries, flood plain, geologic survey,reference plans, subdivision, land use, typographic and water and soil.   | File Closed Date | P          | S/O, Excludes actual data residing on systems. Where applicable, a copy is kept in the related roll file |
| <b>DEV08</b> | Land Use Bylaw Amendment Applications                       | Records regarding Land Use Bylaw amendment applications and reports. Includes rezoning (redistricting) applications.   | File Closed Date | 2 Years ** | File Closed Date = Final decision is made ** - archive review  |
| <b>DEV09</b> | Development Statistics                                      | Records include monthly and annual reports of development permits and building permit statistics.  | File Closed Date | 10 Year ** | File Closed Date = Project Completion ** - archive review  |
| <b>DEV10</b> | Environmental Planning                                      | Records related to environmental studies with a long range planning emphasis such as flood control, watershed management, open space planning and storm drainage.<br>Records related too local improvement programs such as studies, statistics and any required background information. | 15 Years **      | P          | ** - archive review  |
| <b>DEV11</b> | Local Improvements  |  | File Closed Date | P          | File Closed Date = Project Completion ** - archive review  |

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|---------------|---|---|------------------|-------------|--|
| <b>DEV12</b>  | Municipal Addressing                    | Records related to the assignment of new subdivisions and other street names and numbers such as correspondence, reports, 911 sign applications and drawings.   | File Closed Date | 10 Years ** | ** - archive review  |
| <b>DEV13</b>  | Statutory Plans                         | Records include statutory plans and amendments to statutory plans. Includes, Inter-municipal Development Plan, Municipal Development Plan, Area Structure Plans, Area Redevelopment Plans, etc.   | File Closed Date | P           |  |
| <b>DEV14</b>  | Registered Plans                        | Records related to the approval of plans of commercial and residential subdivisions such as drawings, technical reports, written comments, working notes, "red line" revisions, changes to approved plans, status reports and background information. |                  | P           | File Closed Date = Final Decision                                  |
| <b>DEV 15</b> | Agricultural Development/Tile Drainage  | Includes all records in relation to Tile Drainage applications and installations  | File Closed Date | P           | Kept in related Roll file  |
| <b>DEV 16</b> | Official Plans & Amendment Applications | Includes all Official Plans, related correspondence & amendment applications  | File Closed Date | P           | Where applicable, applications are kept in the related roll files  |
| <b>DEV 17</b> | Property/Roll Files                     | Includes all related correspondence, applications and pertinent information related to specific properties. Sorted by Roll file   | File Closed Date | P           | When a roll is closed, the note "closed will be noted on the file" |

| ENV - ENVIRONMENTAL SERVICES MANAGEMENT |                                 |   |                  |                  |   |
|---|---------------------------------|---|------------------|------------------|---|
| CLASSIFICATION CODE                     | ACTIVITY                        | DESCRIPTION   | TRIGGER          | RETENTION PERIOD | NOTE  |
| ENV                                     |                                 | Records related to the assessment, preservation and protection of natural resources and the environment including environmental impact assessments, hazardous materials control, reclamation and remediation and forest preservation.   |                  |                  |   |
| ENV01                                   | Chemical Applications Control   | Includes records related to the application of pesticides, fertilizer and weed control mixtures, exterior building and window cleaning solutions such as spray books, logs, spray notices and handling and storage records. Also includes chemical applications used in pools and fountains such as chlorine and bacteria analysis and related application documentation.   | File Closed Date | p                | File Closed Date = date pesticide was applied *Where applicable, copies are kept in related roll files* |
| ENV02                                   | Environmental Impact Assessment | Records related to the completion of an environmental impact assessment including the identification of environmental conditions and areas of major concern regarding potential environmental, social and economic impacts; plans to mitigate the impacts; the consideration of alternatives, community consultation and monitoring plans, and plans for minimizing the production or the release into the environment of substances that may have an adverse effect. | File Closed Date | p                | File Closed Date = Completion of Assessment *Where applicable, copies are kept in related roll files*   |

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| <b>ENV03</b>  | Hazardous Waste Management                     | Records related to the management of hazardous materials including pick up and transport such as requisitions, manifest reports, transit and disposal; testing and analytical hazardous recyclable dockets. | File Closed Date       | P                                       | File Closed Date = Superseded or Obsolete *Where applicable, copies are kept in related roll files*. |
| <b>ENV04</b>  | Chemical Spill Management                      | Records related to the clean-up of spills and land reclamation.   | File Closed Date       | P                                       | File Closed Date = Resolution *Where applicable, copies are kept in related roll files*              |
| <b>ENV05</b>  | Forest Preservation                            | Records related to forestry planning, health and protection.  | Calendar Year End Date | P                                       | *Where applicable, copies are kept in related roll files*  |
| <b>ENV06</b>  | Livestock Affidavits                           | Records related to livestock damage reports to OMAFRA. Includes final report, correspondence and application  | File Closed Date       | 7 Years                                 |  |
| <b>ENV07</b>  | Municipal Energy Report                        | Records related to annual energy reporting that is submitted to the Ministry of Energy  | File Received by MOE   | 10 years                                |  |
| <b>ENV08</b>  | MOE & MNR Correspondence                       | Includes any records related to MOE & MNR correspondence that is specific to properties & rolls.  | File Closed Date       | P *unless approved to destroy by clerk* | *Where applicable, copies are kept in related roll files*  |
| <b>ENV09</b>  | Pits & Quarries - Aggregate                    | All correspondence and annual reports related to pits, quarries and aggregate extraction in the Township  | Calendar Year End Date | 10 Years                                | *Where applicable, copies are kept in related roll files*  |
| <b>ENV10</b>  | Village Hilton Beach - Landfill Correspondence | All correspondence related to Village Hilton Beach landfills & operations   | File Closed Date       | P                                       |  |
| <b>ENV 11</b> | Village Hilton Beach - Landfill Reports        | Includes lifecycle reports, liability estimations, and other information related to the closure of landfills (either in the future or present)  | File Closed Date       | P                                       |  |
| <b>ENV 12</b> | Recycling, Waste & Site Records                | Records related to recycling and waste removal & pickup, and dump site access records.  | File Closed Date       | 7 Years                                 | *Where applicable, copies are kept in related roll files*  |
| <b>ENV 13</b> | Renewable Energy                               | Records related to renewable energy studies, recommendations, projects, programs and related applications.  | File Closed Date       | 7 Years                                 | *Where applicable, copies are kept in related roll files*  |

# ESM - EMERGENCY SERVICES MANAGEMENT

| CLASSIFICATION CODE | ACTIVITY                       | DESCRIPTION  | TRIGGER          | RETENTION PERIOD | NOTE                                      |
|---------------------|--------------------------------|--|------------------|------------------|---|
| ESM                 |                                | Records related to the provision of emergency management services. Records include plans and activities that pertain to the prevention and mitigation of, preparedness for, and response and recovery to emergencies and disasters.  |                  |                  |   |
| ESM01               | 911 Service                    | Records related to the organization, planning and administration of the 911 emergency service. Also includes: Records and reports documenting details of fire and rescue response to calls.  | File Closed Date | P                | File Closed Date = Superseded or Obsolete |
| ESM02               | Disaster Response Coordination | Records related to the municipality's response to and involvement in community health & safety emergencies or natural disasters such as emergency response team and post event lessons learned.  | File Closed Date | P                | File Closed Date = Superseded or Obsolete |
| ESM03               | Emergency Planning             | Records related to the planning for disasters and emergencies such as emergency plans, training and exercises. Includes copies of agreements and understandings with other jurisdictions relating to reciprocal assistance. May also include contingency plans provided to the municipality. | File Closed Date | P                | File Closed Date = Superseded or Obsolete |



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| ESM04 | Fire Investigations          | Records related to the investigation of fires such as fire dispatch tapes, photographs, working notes, fire reports and correspondence. Includes Fire Marshall reports   | File Closed Date | P       | File Closed Date = Closure of Investigation |
| ESM05 | Fire Services Administration | Records includes reports, studies, statistics for the administration of the fire protection service.Includes all Hlton Union Fire Department correspondence, contracts, budgets, inspection reports and log books. | File Closed Date | 7 Years | File Closed Date = Superseded or Obsolete   |
| ESM06 | Fire Board Meetings          | Records related to Fire Board Meetings re Agendas, Minutes   | Meeting Date     | P       |   |
| ESM07 | Community Preparedness       | Records related to community preparedness for emergencies. Includes public outreach, manuals, reports and correspondence.  | File Closed Date | P       | File Closed Date = Superseded or Obsolete   |
| ESM08 | OPP Community Protection     | Records realted to community protection, police correspondence, annual budets, annual/monthly reports  | File Closed Date | 7 Years |   |
|       |                              |  |                  |         |   |
|       |                              |  |                  |         |   |

| FIN - FINANCIAL MANAGEMENT |                     |   |                      |   |   |
|----------------------------|---------------------|---|----------------------|---|---|
| CLASSIFICATION CODE        | ACTIVITY            | DESCRIPTION   | TRIGGER              | RETENTION PERIOD                                      | NOTE  |
| FIN                        |                     | Records related to the function of managing the municipality's capital and operational budgets and expenses.  |                      |   |   |
| FIN01                      | Accounts Payable    | Includes records related to funds to be paid by the municipality such as: invoices, receipts, cheque requisitions, electronic fund transfers, packing slips, payment approvals, credit card statements and reconciliations, expense reimbursement requests, Council expense reports utility bills and billing backup reports.Includes related governmet remittances (Source, WSIB, EHT) | Fiscal Year End Date | 7 Years *Plus Revenue Canada approval where required* | Includes CUPE/OMERS payments, final reconciliations kept permanent.Source deduction monthly payments also included. WSIB, EHT, Source added |
| FIN02                      | Accounts Receivable | Records related to funds to be collected by the municipality such as: invoices, utility billings, bylaw tickets, receipts, business licenses, vouchers and supporting documentation for all revenues received. Includes bad debt write-offs and utility bill rebates. Includes GST/HST Submissions to CRA.  | Fiscal Year End Date | 7 Years   |   |

|              |                                 |  |                      |             |  |
|--------------|---------------------------------|--|----------------------|-------------|--|
| <b>FIN03</b> | Banking and Cash Management     | Records related to bank transactions and cash management such as bank statements, cheque registers, stop payments, electronic fund/wire transfers, deposit records, supporting documentation used to authorize issuance of cheques.                | Fiscal Year End Date | 7 Years     |  |
| <b>FIN04</b> | Donations                       | Records related to both money and in kind donations received applications, copies of receipts relating to donations and gifts to the municipality as well as those made by the municipality.   | Fiscal Year End Date | 7 Years**   | ** - review archive  |
| <b>FIN05</b> | Budgeting                       | Includes records related to Capital and Departmental budgets and estimates, proposals working notes, calculations and background documentation, budget variances.  | Fiscal Year End Date | 7 Years     |  |
| <b>FIN06</b> | Capital Asset Management & Plan | Records related to the management of capital assets includes fixed asset inventories as well as records of initial expenditure, depreciation, amortization, current value and disposal.Includes asset management plans.                            | File Closed Date     | 10 Years ** | File Closed Date =<br>asset disposal date<br>** - review archive |
| <b>FIN07</b> | Financial Reporting             | Records related to internal monthly, quarterly and topic specific financial analysis and reporting for fiscal review purposes such as month end reporting, spreadsheets and analysis reports.  | Fiscal Year End Date | 7 Years     |  |
| <b>FIN08</b> | Financial Statements            | Includes records related to year-end financial statements, audited financial statements and auditor's reports and notes.   | Fiscal Year End Date | P           |  |
| <b>FIN09</b> | Financial Working Papers        | Records related to the preparation of financial statements or provided to auditors with required information to complete the audit such as working notes, general ledger account reconciliations, bank reconciliations, calculations and analysis. | File Closed Date     | 2 Years     | File Closed Date =<br>audit completion                           |

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|--------------|--|--|----------------------|-----------|---|
| <b>FIN10</b> | Journal Entries                            | Records include journal entries, adjustments and supporting documents clarifying actions taken.  | Fiscal Year End Date | 7 Years** | ** - review archive   |
| <b>FIN11</b> | Regulatory Financial Reporting and Filings | Records related to the financial and regulatory reporting and remittances such as reports to the Minister.   | Fiscal Year End Date | 7 Years   |   |
| <b>FIN12</b> | Reserve Funds                              | Record regarding the management of reserve funds and accounts.   | File Closed Date     | 7 Years   | File Closed Date = Fund Closure Date  |
| <b>FIN13</b> | Grants and Subsidies to the municipality   | Records related to the generation of revenue in the form of grants-in-lieu, provincial and federal grants, loans and subsidies. Also includes submissions, financial statements, acknowledgements and reports.                       | File Closed Date     | 7 Years   | File Closed Date = Grant and Subsidy has been paid in full and conditions of grant and subsidy have fulfilled |
| <b>FIN14</b> | Grants and Subsidies from the municipality | Records related to the distribution of funds in the form of grants-in-aid, subsidies and rebate programs. Includes submissions, financial statements, acknowledgements and reports.  | File Closed Date     | 7 Years   | File Closed Date = Grant and Subsidy has been paid in full and conditions of grant and subsidy have fulfilled |
| <b>FIN15</b> | Investment Management                      | Records related to the municipality's investments for trust certificates, guaranteed investment certificates and deposits such as investment transaction receipts, interest income calculation, statements of account and reporting. | File Closed Date     | 7 Years   | File Closed Date = Investment has been closed   |
| <b>FIN16</b> | Debt Management                            | Records regarding the approval, initial issuance of the debenture, repayment transactions and correspondence for all long-term debt undertaken by the municipality. Also includes: promisory notes                                   | File Closed Date     | 10 Years  | File Closed Date = Expiry of instrument   |

|              |   |   |                      |          |   |
|--------------|---|---|----------------------|----------|---|
| <b>FIN17</b> | Payroll Processing                            | Records regarding the payment and reporting of salary and benefits such as wages paid and deductions made, payroll remittance, reporting and T4s summaries. Includes all OMERS correspondence, payments and annual reports. Garnishments are also included. | Fiscal Year End Date | P        | Addition of OMERS Garnishments. Removal of Timesheets - moved to 7 years as FIN24                         |
| <b>FIN18</b> | Purchase Orders and Requisitions              | Records include purchase requests, requisitions and approvals, purchase orders, blanket orders and background documentation.  | Fiscal Year End Date | 7 Years  |   |
| <b>FIN19</b> | Requests for Proposal, Tenders and Quotations | Records related to invitations to tender, requests for proposals, requests for quotations, requests for qualifications, evaluations of tenders, letters of acceptance, supporting documentation from suppliers of goods and services.                       | File Closed Date     | 10 Years | File Closed Date = Completion of project **<br>Unsuccessful bids - retain for 2 years from contract award |
| <b>FIN20</b> | Suppliers & Vendors Management                | Records related to the management of municipality approved service providers and suppliers such as price lists, catalogues, engagement parameters and correspondence.   | File Closed Date     | D        | File Closed Date = No longer working with vendor  |
| <b>FIN21</b> | Reserve Funds                                 | Record regarding the management of reserve funds and accounts.  | File Closed Date     | 7 Years  | File Closed Date = Closure of Fund  |
| <b>FIN22</b> | Property Taxes                                | Records related to the calculation and reporting of property taxes.   | Fiscal Year End Date | P        | Interim & Final Tax Runs - Additional Tax related information kept on TMM                                 |

|              |   |   |                                     |         |   |
|--------------|---|---|-------------------------------------|---------|---|
| <b>FIN23</b> | Tax Assessments                           | Record regarding the assessment for tax purposes of all property in the municipality such as notice of assessments, assessment appeals billing requisitions, NSF notices. Tax assesments include those related to property, business, business and community revitalization zones, well drilling equipment, local improvement and special levies. Includes related court records. | File Closed Date                    | P       | File Closed Date = Completion of assessment             |
| <b>FIN24</b> | Timesheets                                | Payroll Timesheets & Timecards  | Fiscal Year End Date                | 7 Years |   |
| <b>FIN25</b> | Bank Agreements & Documents               | Includes all bank agreements, signing authorities, and other documents relating to the overall management of municipal bank accounts.   | File Closed Date                    | 7 Years |   |
| <b>FIN26</b> | Monthly Payment Vouchers (Council Report) | Includes the monthly council expenditure report (Cemetery & General)  | File Closed Date                    | P       |   |
| <b>FIN27</b> | Financial Information Return              | Records relating to annual financial annual return reporting  | File closed Date/Date of submission | P       |   |
| <b>FIN28</b> | Property Tax Registration                 | Records relating to all propert tax sales, registration and related legal correspondence  | File closed Date/Date of submission | P       | *Where required, will be kept in the related roll file* |

## GOV - GOVERNANCE MANAGEMENT

| CLASSIFICATION CODE | ACTIVITY                                      | DESCRIPTION  | TRIGGER          | RETENTION PERIOD | NOTE  |
|---------------------|---|--|------------------|------------------|---|
| GOV                 |   | Records related to Council, Council Committees and its accountability for governing the municipality including corporate documents, strategic initiatives, Council meetings and motion records, bylaws, applicable legislation and regulations and intergovernmental liaison with other government bodies that have an impact on the municipality. |                  |                  |   |
| GOV01               | By-laws                                       | Records include Bylaws introduced and adopted by Council.  | File Closed Date | P                | File Closed Date = Bylaw introduced to Council                  |
| GOV02               | Legislation and Regulation                    | Records related to applicable legislation and regulations that govern the municipality's procedures.   | File Closed Date | D                | File Closed Date = legislation or regulation revoked or amended |
| GOV03               | Articles of Incorporation                     | Official seals of the municipality's logos, articles of incorporation, letters patent, orders and other official records identifying the authority of the municipality.  | File Closed Date | P                | File Closed Date = Superseded or Obsolete                       |
| GOV04               | Council Members                               | Council members elected or appointed to the Council. Includes alternate Director appointments. Records include Oath of Office taken by members, Council orientation material, appointment by Council, Chair or Council, Statement of Financial Disclosure, Gift Disclosure.  | File Closed Date | P                | File Closed Date = Until term of office expires                 |
| GOV05               | Council Meetings                              | Records related to Council meetings such as the minutes. For Agendas and Resolutions, see GOV07  | Meeting Date     | P                |   |
| GOV06               | Briefs, Recommendations, & Reports to Council | Includes any briefs, memos, reports and recommendations that are made to Council or related committees   | Meeting Date     | 7 Years          |   |



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|--------------|--|--|------------------------|-------------------------------------|--|
| <b>GOV07</b> | Council & Committee Agendas, Resolutions | Agendas and Resolutions in relation to Council and related committees (internal)   | Meeting Date           | 2 years                             |  |
| <b>GOV08</b> | Audio Meeting Recordings                 | Audio recordings of Council meetings.  | Meeting Date           | Approval of subject meeting minutes | Transitory record created for the purpose of preparing meeting minutes |
| <b>GOV09</b> | Delegation Requests                      | Records regarding the application to be delegation and associated supplementary information.   | Calendar year End Date | 1 Year                              |  |
| <b>GOV10</b> | Council Committee Meetings               | Records related to Council Committees appointed by the Chair to provide recommendations to the Council. Records include: meeting minutes and agendas.  | Meeting Date           | P                                   |  |
| <b>GOV11</b> | Terms of Reference                       | Records regarding the Terms of Reference for the municipality's Council and Advisory Committees.   | File Closed Date       | P                                   | File Closed Date = Superseded or Obsolete                              |
| <b>GOV12</b> | Committee Member Applications            | Records related to the application and appointment of the municipality's Advisory Committees.  | File Closed Date       | 1 Year                              | File Closed Date = Until term of office expires                        |
| <b>GOV13</b> | Intergovernmental Relations              | Records regarding the municipality's involvement with other municipalities, government bodies and agencies whose functions may have an impact on or involve the municipality such as correspondence, negotiations, advice, policy directives, notifications and inquiries, government submissions and reports. | Calendar year End Date | 7 Years                             |  |

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|--------------|--------------------------|--|------------------|--|---|
| <b>GOV14</b> | Elections                | Includes records related to nominations, election results, information on ward boundaries and all other documentation related to the administrative needs of conducting an election.       | File Closed Date | ** not specified - As Per Election Act | File Closed Date = Until term of office expires   |
| <b>GOV15</b> | Voters List, Ballots     | Records related to voters' lists, nominations, election results, information on ward boundaries and all other documentation related to the administrative needs of conducting an election. | File Closed Date | p**                                    | File Closed Date = Until term of office expires **Ballot = 120 days after voting or resolution of recount |
| <b>GOV16</b> | Strategic Planning       | Includes Council Strategic Plan and Corporate Plans with defined municipality goals objectives, mission statements for the municipality.   | File Closed Date | 10 Years**                             | File Closed Date = Superseded plan should be retained until the plan it replaces has itself been updated. |
| <b>GOV17</b> | Clerk's Notes            | Includes all Clerk's notes in regard to Council Meetings.  | Date of Meeting  | 1 Year** + Clerk's Discretion          | Unless determined by Clerk that some notes should be kept for longer/permanent                            |
| <b>GOV18</b> | Ontario Municipal Board  | Records for all Notice of Applications to the Ontario Municipal Board  | File Closed Date | 7 Years                                |   |
| <b>GOV19</b> | OMB Hearings & Decisions | Ontario Municipal Board Hearings, Decisions and Appeals  | File Closed Date | P                                      |   |
| <b>GOV20</b> | Ombudsman Reports        | Records for all Ombudsman reports, correspondence, cases and appeals   | File Closed Date | P                                      |   |

| HR - HUMAN RESOURCES MANAGEMENT |                   |   |                        |                  |   |
|---------------------------------|-------------------|---|------------------------|------------------|---|
| CLASSIFICATION CODE             | ACTIVITY          | DESCRIPTION   | TRIGGER                | RETENTION PERIOD | NOTE                                      |
| HR                              |                   | Records related to the management of the municipality's staff and volunteers including employee status, volunteer status, compensation and benefits administration, training and skills development, health and safety, and labour relations. |                        |                  |   |
| HR01                            | Benefits Planning | Records include: brochures, rates, quotes, correspondence and explanatory documents regarding benefits offered to staff such as group insurance, dental plans, employee support groups.   | File Closed Date       | P                | File Closed Date = Superseded or Obsolete |
| HR02                            | Salary Planning   | Records related to the planning and scheduling of salaries, such as job evaluations, job classification systems, salary surveys and schedules. Also includes any reference material retained regarding issues related to pay equity.          | File Closed Date       | 5 Years          | File Closed Date = Superseded or Obsolete |
| HR03                            | Attendance        | Records related to employee attendance, shift scheduling, vacation requests, flex scheduling, hours of work, staff on call, lieu time reports. Also includes management leave allocation.   | Calendar Year End Date | 3 Years          |   |

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|------|---------------------------------------|---|-------------------------|---------|---|
| HR04 | Employee File                         | Records include resumes, hiring and job change documents, benefits enrolment, performance reviews, injury reports, criminal records checks, training and certificates of achievement, work plans, driver records, and disciplinary action. Includes records for all full time, part time, casual, temporary and contract staff on the municipality's payroll. | Employee Departure Date | P       |   |
| HR05 | Employee Hazardous Substance Exposure | Records regarding an employee's exposure to hazardous Substances.   | File Closed Date        | P       |   |
| HR06 | Employee Medical File                 | Records regarding a specific employee's medical treatment and status such as medical information, medical certificates, Physician notes, Independent Medical Exam (IME), personnel health programs, request for medical records, authority for surgery and medical treatment, check-ups, authorization of release of hospital information.                    | Employee Departure Date | P       |   |
| HR07 | Employee Pension Entitlement          | Records detailing obligations to individuals entitled to a pension based on their employment at the municipality such as applications, eligible service timeframe, pensionable earnings and beneficiary designations.   | Employee Departure Date | P       |   |
| HR08 | Occupational Health Administration    | Records related to programs and assessments regarding ergonomics, disability management, wellness, job health, employment equity, testing and monitoring, potential hazards, investigations.  | File Closed Date        | 7 Years | File Closed Date = Superseded or Obsolete |

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|-------------|---|--|------------------|-----------------------|--|
| <b>HR09</b> | Safety and Incident Management                | Records related to ensuring a safe working and operational environment on the municipality's property and includes WHMIS, completed incident and near miss forms.  | File Closed Date | P                     | File Closed Date = Superseded or Obsolete  |
| <b>HR10</b> | Workers' Compensation & Disability Management | Records regarding workers' compensation claims and disability management such as WCB reports, WCB assessments, alternate work assignment, and other records regarding employee injuries. Also includes: Long Term Disability and return to work programs.                  | File Closed Date | P                     | File Closed Date = Resolution of Claim     |
| <b>HR11</b> | Grievance & Arbitration Case Management       | Records regarding individual arbitration and grievances, such as completed forms, case notes, letters, decisions.  | File Closed Date | 10 Years              | File Closed Date = Resolution of Claim     |
| <b>HR12</b> | Labour Negotiations                           | Records include: union negotiations, collective bargaining, conflict resolution and dispute mediation discussions.   | File Closed Date | 10 Years **           | File Closed Date = Expiry of agreement     |
| <b>HR13</b> | Job Descriptions                              | Records related to job descriptions and specifications as well as background information used in their preparation or amendment.   | File Closed Date | 7 Years**             | File Closed Date = Superseded or Obsolete  |
| <b>HR14</b> | Staff Establishment Chart                     | Records related to the number of positions and employees per Department, approved by the Board.  | File Closed Date | Minimum of 5 Years ** | File Closed Date = Superseded or Obsolete  |
| <b>HR15</b> | Organizational Structure                      | Records regarding reporting relationships, reorganization, organizational analysts, charts, graphs, reviews and recommendations.   | File Closed Date | 5 Years**             | File Closed Date = Superseded or Obsolete  |
| <b>HR16</b> | Recruitment                                   | Records related to solicited and unsolicited resumes, letters of interest, interview questions, job postings regarding hiring of staff and related correspondence to the hiring of staff. Also includes broader resource planning and staffing requirements documentation. | File Closed Date | 2 Years               | File Closed Date = Fulfillment of Position |

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|------|--|--|------------------|--|--|
| HR17 | Training & Development                                 | Records include course information, orientation materials etc. regarding the provision of training courses.  | File Closed Date | 2 Years**, Drinking water, wastewater and stormwater materials = 7 Years |  |
| HR18 | Volunteers   | Records include applications, reference checks, placement forms, criminal record checks, vulnerability checks on individuals wishing to volunteer their services to the Town.            | File Closed Date | 7 Years  | File Closed Date = Services No Longer Required |
| HR19 | HR Consultant Notes, Management Notes & Correspondence | Includes all correspondence in regard to consultation on various HR items & Management Notes. Where applicable, a copy of the correspondence will be identified by the related employee. | File closed Date | 3 Years  |  |
| HR20 | Uniforms and Clothing                                  | Includes all correspondence and financials in regard to roads clothing allowances & expense reimbursement  | Fiscal Year End  | 7 years  |  |
| HR21 | Health and Safety Records                              | Records of monthly building inspections, monthly safety reports and incident reports   | Fiscal Year End  | 7 Years  |  |
|      |  |  |                  |  |  |
|      |  |  |                  |  |  |

IM - INFORMATION MANAGEMENT

| CLASSIFICATION CODE | ACTIVITY                                  | DESCRIPTION  | TRIGGER          | RETENTION PERIOD | NOTE                                      |
|---------------------|---|--|------------------|------------------|---|
| IM                  |   | Records related to the management of the municipality's corporate records. Records include the documenting of corporate records retention and disposition.   |                  |                  |   |
| IM01                | Records Disposition                       | Records regarding the destruction of the municipality's corporate records such as destruction certificates, destruction authorizations and correspondence.   | Disposition Date | P                |   |
| IM02                | Records Management Program Administration | Records related to the development, enhancement and administration of the records management program. Also includes user guidelines and training modules, monitoring and compliance assessments, activity reports and inactive records listings. | File Closed Date | D                | File Closed Date = Superseded or Obsolete |



| IT - INFORMATION TECHNOLOGY MANAGEMENT |                                  |   |                  |                  |   |
|--|----------------------------------|---|------------------|------------------|---|
| CLASSIFICATION CODE                    | ACTIVITY                         | DESCRIPTION   | TRIGGER          | RETENTION PERIOD | NOTE                                      |
| IT                                     |                                  | Records related to the provision of technology throughout the municipality such as the design and development of hardware and software systems, application development, corporate and desktop security, server and network management.   |                  |                  |   |
| IT01                                   | Access Permissions &Control      | Records related to the security and access rights configuration and the granting of access to corporate systems and applications, such as security configuration records, user authorization lists, and privileges and requests for access.   | File Closed Date | 1 Year           | File Closed Date = Superseded or Obsolete |
| IT02                                   | Technology Design & Architecture | Records regarding the design, development and implementation of existing and new IT systems and infrastructure such as software applications, hardware infrastructure, and internal or external websites such as network diagrams, user requirements, technical design information, website structure specifications, software and software updates, system testing statements, and related system development. | File Closed Date | 7 Years          | File Closed Date = Superseded or Obsolete |

|      |                                 |  |                        |         |   |
|------|---------------------------------|--|------------------------|---------|---|
| IT03 | Applications & Hardware Support | Records used for or created when supporting users having issues with technology infrastructure. Includes help desk calls, change management requests, application and hardware user manuals and support tools.                                 | Calendar Year End Date | 2 Years |   |
| IT04 | Technology Recovery             | Includes records created or used to recover applications and technology infrastructure. Documents include disaster recovery process documents, and system images/server configuration created on a daily, weekly, monthly and annual rotation. | File Closed Date       | P       | File Closed Date = Superseded or Obsolete |

## LEG - LEGAL AND REGULATORY MANAGEMENT

| CLASSIFICATION CODE | ACTIVITY                          | DESCRIPTION   | TRIGGER          | RETENTION PERIOD | NOTE   |
|---------------------|-----------------------------------|---|------------------|------------------|--|
| LEG                 |                                   | Records related to legal obligations of the municipality including issuance of permits, by-law enforcement, ensuring contractual rights and obligations are fulfilled, insurance and risks management, and legal matters management.                                |                  |                  |  |
| LEG01               | Bylaw Infraction Prosecution      | Records related to the enforcement of the municipality's bylaws such as orders to comply, inspection reports, consent order, and stop work orders.  | File Closed Date | 7 Years          | File Closed Date = Delivery Judgement                          |
| LEG02               | Potential Violation Investigation | Records related to complaints and violations identified such as incident descriptions, investigation of the violation, remediation efforts and reports.   | File Closed Date | P                | File Closed Date = Investigation Completed                     |
| LEG03               | Contracts and Agreements          | Records include contracts, agreements, leases and memorandum of understanding entered into by the municipality that create an obligation and bind the municipality to a person or organization. Includes roads closing files, road widening & road dedication files | File Closed Date | 7 Years **       | File Closed Date = Contract Expiry Date<br>** - review archive |

|              |                           |   |                  |           |   |
|--------------|---------------------------|---|------------------|-----------|---|
| <b>LEG12</b> | Legal Advice and Opinions | Records related to opinions and briefs provided by legal counsel on specific issues and bylaws.   | File Closed Date | P         | File Closed Date = Superseded or Obsolete |
| <b>LEG13</b> | Litigation                | Records regarding legal action undertaken on behalf of the municipality or against the municipality such as statement of defence, court minutes, witness statements. Includes final decisions and any court case documents. | File Closed Date | Permanent | File Closed Date                          |
| <b>LEG14</b> | Precedents                | Records related to landmark precedents or significant legal opinions on specific issues, which may impact the municipality.   | File Closed Date | P         | File Closed Date = Superseded or Obsolete |
| <b>LEG15</b> | Permits and Licences      | Records related to application for and approvals for fire permits, business licences, dog licences and special event permits.   | File Closed Date | 2 Years   | File Closed Date = Expired                |
| <b>LEG16</b> | Fence Viewers             | Records related to Fence Viewing, all related correspondence including final decisions, hearings and appeals.   | File Closed Date | P         | Kept in related roll files                |
| <b>LEG17</b> | Registered Letters        | Registered letters sent to specific properties or property owners.  | File Closed Date | P         | Kept in related roll files                |

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## PRK - PARKS AND RECREATION MANAGEMENT

| CLASSIFICATION CODE | ACTIVITY  | DESCRIPTION   | TRIGGER                | RETENTION PERIOD  | NOTE                                      |
|---------------------|---|---|------------------------|---|---|
| <b>PRK</b>          |   | Records related to the provision of parks and recreation services.  |                        |   |   |
| <b>PRK01</b>        | Recreational Bookings                             | Records include bookings for recreational and administrative facilities, application for use including recreational centres, swimming pools, baseball diamonds and soccer fields and private facility bookings.                           | Calendar Year End Date | 2 Years ** - Incidents occurring within facility must be retained | ** - review archive                       |
| <b>PRK02</b>        | Recreation and Cultural Programming               | Records related to cultural programs offered by the municipality such as membership lists, course evaluations, course descriptions, supply lists, waiting lists, course background for cultural programs provided by the municipality.    | File Closed Date       | 7 Years   | File Closed Date = Superseded or Obsolete |
| <b>PRK03</b>        | Family and Community Support Services Programming | Records related to services that are of a preventive nature that enhances the social well-being of individuals and families through promotion or intervention strategies as permitted under the Family and Community Support Service Act. | File Closed Date       | P   | File Closed Date = Superseded or Obsolete |

[illegible]

| UIP - UTILITIES & INFRASTRUCTURE MANAGEMENT |                               |  |                        |   |                                  |
|---|-------------------------------|--|------------------------|---|----------------------------------|
| CLASSIFICATION CODE                         | ACTIVITY                      | DESCRIPTION  | TRIGGER                | RETENTION PERIOD                        | NOTE                             |
| UIP   |                               | Records related to the provision of utilities and infrastructure such as wastewater, water, solid waste including design specifications, drawings and plans; construction coordination; infrastructure maintenance and operations. |                        |   |                                  |
| UIP01                                       | Storm Sewers Maintenance      | Records regarding routine monitoring and maintenance of storm sewers.  | File Closed Date       | P                                       | File Closed Date = Life of Asset |
| UIP02                                       | Utility Service Connections   | Records include meter reading requests, line locates, meter hookups and utility change forms.  | Calendar Year End Date | 7 Years                                 |                                  |
| UIP03                                       | Utility Service Meters        | Records related to utility services meters such as meter inspection reports, meter repairs, leak repairs, service installation reports, schematics of line on property and copy of the building permit application.                | Calendar Year End Date | P                                       |                                  |
| UIP04                                       | Water Maintenance & Treatment | Records include pressure reports, service line leak detections, maintenance reports, water main repairs, photographs. Includes all water treatment reports   | Calendar Year End Date | 15 Years,<br>Specifications = permanent |                                  |
| UIP05                                       | Water Monitoring              | Records related to the analysis of drinking water, month end reports.  | Calendar Year End Date | P                                       |                                  |
|   |                               |  |                        |   |                                  |
|   |                               |  |                        |   |                                  |