

Retention Guidelines for Common Administrative Records of the Government of Canada

General Administration Function

Subject Group	Subject and Description	Retention Guidelines and/or Remarks
Access to information and privacy	Policy, procedures	5 years after superseded (Active 2 years, Dormant 3 years)
	Routine	2 years
	Individual requests for access to records under the acts	2 years after resolution
	Reports, registrations	2 years
Accidents	Aircraft, railway, ships, explosives	Excluded in MIDA Number 98/001.
	Claims	See “Comptrollership Function”
	Motor vehicles, equipment	
	Policy, procedures	5 years after superseded (Active 2 years, Dormant 3 years)
	Routine	2 years
	Claims	See “Comptrollership Function”
Personnel		See “Occupational safety and health” under the Human Resources Management Function
Acts and legislation	Federal, provincial, territorial or foreign acts and legislation, federal Bills, statutory orders, regulations, Orders in Council, Cabinet Directives and Treasury Board Minutes. Correspondence and working records leading to their preparation and amendment	Excluded in MIDA Number 98/001.

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Subject Group	Subject and Description	Retention Guidelines and/or Remarks
Agreements	Federal, provincial, territorial, foreign, municipal.	Excluded in MIDA Number 98/001.
Appreciation, condolences, congratulations and greetings.	Special occasions, holidays, congratulations to royalty	Excluded in MIDA Number 98/001.
Associations, clubs, federations, institutes, leagues, orders and societies.	Policy, proceedings, minutes, annual reports, financial statements	Excluded in MIDA Number 98/001.
	Routine correspondence including memberships, social functions, invitations, subscriptions, etc.	2 years
Audits and auditing		See “Comptrollership Function”
Badges, emblems, flags	Use, flying, or wearing of badges, coats of arms, emblems, flags, crests, pennants	Excluded in MIDA Number 98/001.
	Purchases and supply	See “Materiel Management Function”
Boards and Courts of Inquiry	Fire, theft, loss, financial, legal (major and minor)	Excluded in MIDA Number 98/001.
Books, pamphlets and publications	Compilation and editing, printing and binding, sale and distribution	
	Policy, procedures	5 years after superseded (Active 2 years, Dormant 3 years)
	Routine	2 years.
	Individual publications	1 year after publication appears or is cancelled

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Cafeterias and eating facilities	Hours of operation, equipment, space, sanitation, catering services, price lists, menus, vending machines	Excluded in MIDA Number 98/001.
Campaigns, canvassing and soliciting	Blood donor clinics, Canada Savings Bonds, charitable such as United Way	Excluded in MIDA Number 98/001.
Ceremonies and celebrations	Laying of cornerstones, Remembrance Day ceremonies, inaugurations	Excluded in MIDA Number 98/001.
Circulars, directives and orders	Departmental administrative and operating orders, circular letters, directives, regulations	Excluded in MIDA Number 98/001.
Committees, boards, panels, conferences, symposia and meetings	Agenda, notices, minutes of meetings, proceedings	Excluded in MIDA Number 98/001.
Communications	Codes, cyphers and passwords, radio and radio systems, telephone, fax and other communication and intercommunication systems	Excluded in MIDA Number 98/001.
	Installation of communication systems	For fixed assets, see “Real Property Management Function” For moveable assets, see “Materiel Management Function”
Complaints	Letters of complaint	Excluded in MIDA Number 98/001.
Co-operation and liaison	Co-operation and liaison with foreign, provincial, territorial and municipal governments, other federal government institutions, colleges, etc.	Excluded in MIDA Number 98/001.

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Subject Group	Subject and Description	Retention Guidelines and/or Remarks
Corporations, companies and firms	Routine correspondence, solicitations, brochures, pamphlets, inquiries, statements, etc.	Excluded in MIDA Number 98/001.
Correspondence management	Correspondence procedure, quality and production control, use of form and guide letters, signing authorities, channels of communication, etc.	
	Policy, procedures	5 years after superseded (Active 2 years, Dormant 3 years)
	Routine	2 years
Cultures and Customs	Doukhobors, Indians, Mennonites, Métis, etc.	Excluded in MIDA Number 98/001.
Documentation services		See “Library services”
Drafting services		See “Office services”
Duplication and reproduction services		See “Office services”
Electronic Data Processing		See “Management of technology”
Emergency planning	Civil defence, demonstrations and riots, disasters, evacuation, national survival	Excluded in MIDA Number 98/001.

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Federal identity program	Applied titles, publications, signage, stationary and forms	Excluded in MIDA Number 98/001.
Forms management	Analysis, design and control, identification, authorization, review, preparation and physical characteristics of forms	
	Policy, procedures	5 years after superseded (Active 2 years, Dormant 3 years)
	Routine	2 years
	Individual function files	Until superseded or obsolete
	Procurement of forms	See “Materiel Management Function”
Gifts and donations	Other than financial	Excluded in MIDA Number 98/001.
	Campaigns and canvassing	See “Campaigns, canvassing and soliciting”
Historical matters	Records outlining the growth and activities of institutions and significant events	Excluded in MIDA Number 98/001.

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Subject Group	Subject and Description	Retention Guidelines and/or Remarks
Information services	Public relations and publicity in newspapers, on radio and television including participation in radio and television programs, articles and manuscripts, biographies for publicity and information purposes, exhibitions and fairs, photographs, slides and films including arrangements and preparation of scripts, requests from the public for information, photographs and publications, lectures and lecturers including speeches and addresses and arrangements for speakers, press releases and press clippings	Excluded in MIDA Number 98/001.
	Posters created for and under the control of a government institution	See MIDA Number 96/024 covering “Poster-creating areas of government institutions.”
	Other posters	Until expired
International affairs and relations	Commissions, missions, pacts and treaties	Excluded in MIDA Number 98/001.
Inventions, patents and copyrights	Acquiring of patent rights, patent licences and assignments, permission to use copyright material	Excluded in MIDA Number 98/001.
Investigations	Fire, loss, theft, financial, legal	Excluded in MIDA Number 98/001.
Legal matters (not legal documents)	Decisions, rulings and opinions, Powers of Attorney, Commissions of Office such as Notaries-Public	Excluded in MIDA Number 98/001.

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Subject Group	Subject and Description	Retention Guidelines and/or Remarks
Library services	Delivery of library, documentation or reference services	
	Policy, procedures	5 years after superseded (Active 2 years, Dormant 3 years)
	Routine	1 year
	Actual intellectual holdings including audio and video recordings, slides, filmstrips, and “grey literature” (that literature without an ISBN number)	Excluded in MIDA Number 98/001.
	Procurement of library material including subscriptions to newspapers and periodicals	See “Procurement” under the Materiel Management Function
Licences and permits	Building passes / admission privileges	See “Security”
	Licences and permits issued to or by institutions	Excluded in MIDA Number 98/001.
	Parking applications and permits issued to or by institutions	2 years after the permit expires. This is a Retention and Disposal Standard governed by the <i>Privacy Act</i> and prescribed by Treasury Board that must be adhered to. See Treasury Board’s publication <i>Info Source: Sources of Federal Employee Information</i> , Standard Bank PSE 914, Parking.

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Subject Group	Subject and Description	Retention Guidelines and/or Remarks
Mail and postal services	Delivery of mail, messenger and postal services, bulk payment system, liaison with public and private service providers	
	Policy, procedures	5 years after superseded (Active 2 years, Dormant 3 years)
	Routine	2 years
	Mailing lists	Until superseded
	Registers and registration related to mail, postal and messenger services	1 year
Management services	Time studies, procedural analysis, process and flow charts, office surveys, management information systems, performance measurement systems, program evaluations	Excluded in MIDA Number 98/001.
Management of technology	Electronic systems development, maintenance, and technical assistance for office systems and databases that support common administrative functions	For procurement, see “Materiel Management Function”
	Policy, procedures	5 years after superseded (Active 2 years, Dormant 3 years)
	Routine	2 years
	Electronic systems development, maintenance, and technical assistance for office systems and databases that support operational functions or operational automated information systems, or any mixture of operational and administrative functions	Excluded in MIDA Number 98/001.

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Subject Group	Subject and Description	Retention Guidelines and/or Remarks
Office Services	General and internal office procedures and services, including information processing.	When “Information processing” is interpreted to include electronic systems development, maintenance, and technical assistance for office systems and databases that support operational functions or operational automated information systems, or any mixture of operational and administrative functions, then such records are excluded in the MIDA Number 98/001.
	Policy, procedures	5 years after superseded (Active 2 years, Dormant 3 years)
	Routine	1 year
	Drafting services	
	Policy, procedures	5 years after superseded (Active 2 years, Dormant 3 years)
	Routine	2 years
	Individual drafting items	1 year after drafting is completed
	Duplication and reproduction services	
	Policy, procedures	5 years after superseded (Active 2 years, Dormant 3 years)
	Routine	2 years
	Requisitions	6 months
	Secretarial and stenographic services	1 year
	Word processing, typing and transcribing services	1 year
Organization	Policies, procedures, functions, responsibilities, boundaries, etc.	Excluded in MIDA Number 98/001.

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Subject Group	Subject and Description	Retention Guidelines and/or Remarks
Parliament	Inquiries	
	Tabled material, returns to addresses, orders for returns, etc.	Excluded in MIDA Number 98/001.
	Royal Commissions and documents, institutional records, and other commissions at the Ministerial and institutional levels	Excluded in MIDA Number 98/001.
Plans and programs	Policy, procedures and routine	Excluded in MIDA Number 98/001.
	Alternative service delivery	Exclusion C8.1 of Terms and Conditions of the MIDA Number 99/004 covering the Comptrollership Function.
Politics	Elections	
	Federal, provincial and other governmental organizations, including ballot papers, election accounts, policy concerning elections, etc.	Excluded in MIDA Number 98/001.
Records management	General	
	Policy, procedures	5 years after superseded (Active 2 years, Dormant 3 years)
	Routine	2 years
	Automation	
	Policy, procedures	5 years after superseded (Active 2 years, Dormant 3 years)
<i>(cont'd)</i>	Routine	2 years

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Subject Group	Subject and Description	Retention Guidelines and/or Remarks
Records management (<i>cont'd</i>)	Disposition of records	
	Policy, procedures	5 years after superseded (Active 2 years, Dormant 3 years)
	Routine	2 years
	Disposition authorities	
	Treasury Board Minutes and Records Disposition Authorities issued by the National Archivist of Canada	Until superseded or amended
	Lists, indices and registers of files or records destroyed	10 years after files or records destroyed
	Essential records	
	Actual records designated essential	Excluded in MIDA Number 98/001.
	Micrographics and imaging program	
	Policy, procedures	5 years after superseded (Active 2 years, Dormant 3 years)
Routine	2 years	
Actual records microfilmed or imaged	Excluded in MIDA Number 98/001.	
Reference services		See "Library Services"
Regulations	Acts and legislation	See "Acts and legislation"
	Administrative	See "Circulars, directives and orders"

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Subject Group	Subject and Description	Retention Guidelines and/or Remarks
Reports and statistics	Policy, procedures, routine, annual (departmental) and reports including drafts, supporting documentation and correspondence and other reports (weekly, monthly of a routine nature and Post reports from abroad)	Excluded in MIDA Number 98/001.
Secretarial and stenographic services		See "Office services"
Security	Policy, procedures	5 years after superseded (Active 2 years, Dormant 3 years)
	Routine	2 years
	Breaches	6 months
	Clearances and reliability checks	
	Personnel	
	Policy, procedures	5 years after superseded (Active 2 years, Dormant 3 years)
	Routine	2 years
	Individual files	2 years after an employee leaves the institution for which the clearance was obtained. This is a Retention and Disposal Standard governed by the <i>Privacy Act</i> and prescribed by Treasury Board that must be adhered to. See Treasury Board's publication <i>Info Source: Sources of Federal Employee Information</i> , Standard Banks PSE 909, Security Clearances and PSE 921, Reliability Checks.
(cont'd)	Visits and visitors	1 year

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Subject Group	Subject and Description	Retention Guidelines and/or Remarks
Security (<i>cont'd</i>)	Communications	
	Policy, procedures	5 years after superseded (Active 2 years, Dormant 3 years)
	Routine	2 years
	Identification methods	
	Policy, procedures	5 years after superseded (Active 2 years, Dormant 3 years)
	Routine	2 years
	Identification and Building-pass cards	2 years after expiry. This is a Retention and Disposal Standard governed by the <i>Privacy Act</i> and prescribed by Treasury Board that must be adhered to. See Treasury Board's publication <i>Info Source: Sources of Federal Employee Information</i> , Standard Bank PSE 917, Identification and Building-Pass Cards.
	Industrial	
	Policy, procedures	5 years after superseded (Active 2 years, Dormant 3 years)
	Routine	2 years
	Informatics	
	Electronic network monitoring logs	2 years after last administrative use unless the individual concerned consents to its earlier disposal. This is a Retention and Disposal Standard governed by the <i>Privacy Act</i> and prescribed by Treasury Board that must be adhered to. See Treasury Board's publication <i>Info Source: Sources of Federal Employee Information</i> , Standard Bank PSE 922, Electronic Network Monitoring Logs.
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Subject Group	Subject and Description	Retention Guidelines and/or Remarks
Security (<i>cont'd</i>)	Information	
	Exchange and release	
	Policy, procedures	5 years after superseded (Active 2 years, Dormant 3 years)
	Routine	2 years
	Physical	
	Buildings, contingency planning, equipment, grounds, guards, etc.	
	Policy, procedures	5 years after superseded (Active 2 years, Dormant 3 years)
	Routine	2 years or 1 year after requirement ceases
	Regulations and orders	Until superseded or revoked
	Reports and returns	
	Inspections, surveys, etc.	5 years (Active 2 years, Dormant 3 years)
	Subversive activities	
	Sabotage, espionage, etc.	Excluded in MIDA Number 98/001.
Translation services	Correspondence relating to and requisitions for	1 year

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Subject Group	Subject and Description	Retention Guidelines and/or Remarks
Transportation / travel	General	
	Air, rail, road and water	
	Policy, procedures	5 years after superseded (Active 2 years, Dormant 3 years)
	Routine (arrangements for tickets, passage, taxi services, fares and tariffs, etc.)	1 year
	Baggage	
	Lost, damaged or unclaimed	1 year
	Effects - property and goods	
	Air, rail, road and water	
	Policy, procedures	5 years after superseded (Active 2 years, Dormant 3 years)
	Routine	1 year
	Freight and express	
	Air, rail, road and water	
	Routine	1 year
	Rates, tariffs, schedules, etc.	Until superseded or revoked
Hotel reservations		
Reservations, confirmations	6 months	
Personnel		
Air, rail, road and water		
Policy, procedures	5 years after superseded (Active 2 years, Dormant 3 years)	
Routine	1 year	

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Subject Group	Subject and Description	Retention Guidelines and/or Remarks
Visits, tours and itineraries	General	
	Policy, procedures	5 years after superseded (Active 2 years, Dormant 3 years)
	Routine	1 year
	Routine itineraries	6 months
	Royalty, Heads of State, and other dignitaries	1 year after the visit
Word processing, typing and transcribing services		See "Office services"