

Records Management Policy

Overview

As an organization, the **Alberta Post-Secondary Application System (APAS)** affirms the need for good records management practices to create, capture, use, and dispose of its corporate **records**. These practices support APAS organizational goals and obligations to allow it to meet the needs of its partner organizations and the learners who use its services.

The Policy applies to all records created, received or collected, maintained, and disposed in the course of APAS discharging its mandate, regardless of where they are located. This includes, without limitation, records that are stored on an employee's home computer or personal computing device.

The Policy does not apply to **personal communications** of individual staff or persons acting on behalf of APAS, such as contractors and consultants

Purpose

The purpose of this policy is to promote efficient records management, able to address the retention, maintenance, and disposal of corporate records of all types and formats, ensuring APAS is able to meet its organizational, legal, and contractual obligations and requirements while preserving its historical identity.

POLICY

1. GENERAL

APAS will manage its records in accordance with current professional standards and best practices in order to meet its business, fiscal, and legal requirements, and to establish its historical record.

2. ROLES AND RESPONSIBILITIES

It is the responsibility of the Executive Director to:

- provide guidance to APAS staff on the proper maintenance and disposal of corporate records that they have collected, created, or that have come under their control.
- ensure that all **corporate records** are retained for as long as needed to meet applicable federal and provincial laws and organizational policies.
- ensure that the records that make up the historical record of the organization are collected, organized, and when possible, made available.

It is the responsibility of all staff members to:

- be aware of their legal responsibilities under relevant laws, regulations, policies, and contracts when performing tasks that support the business of APAS.
- follow organizational processes when maintaining or disposing of records under their control. If unfamiliar with the organizations processes, receive direction from the Executive Director.

- leave all records for their successor(s) when leaving the organization or changing positions.
- ensure appropriate security measures are taken when storing records containing personal or other confidential information.
- ensure that all personal and confidential information is destroyed in a permanent and secure manner.

The effective management of APAS records is a responsibility shared by all staff members.

3. CLASSIFICATIONS OF RECORDS

- **Corporate Records** - Those records that maintain evidence of the Society's activities. These include but are not limited to contracts, committee meeting minutes, policies and procedures, employee records, and corporate financial records and audits. All corporate records are the property of APAS.
- **Transitory Records** – Those records that are of a temporary or immediate nature or of no value. These include but are not limited to drafts of memos, letters or reports, or exact duplicates. It is recommended that transitory records be destroyed once they have served their purpose. However, if a request is received as part of a FOIPP request, all undestroyed transitory records related to the request are subject to the Act.
- **Personal Communication** – Personal communication is information in all media and formats that is created, received, or accumulated as a result of personal activities that are not related to the mission, administration, or operation of APAS.

DEFINITIONS

APAS	The Alberta Post-Secondary Application System.
Records	Documents, tabulated or collected data, or recorded information, no matter in what format or how it was received, created, or maintained.
Disposition or destruction of records	Disposal of records no longer needed for day-to-day operations through an appropriately secure method or by transferring the record to a historical archive.
Records Management	The application of systematic control to the creation, use, maintenance, storage, retrieval, disposition, and preservation of all forms of recorded information produced by APAS in the conduct of its operations.