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# **GOVERNMENT OF ONTARIO COMMON RECORDS SCHEDULE MINISTERS' PUBLIC RECORDS**

March 2015

This records schedule governs the retention and disposition of public records in all forms and media made or received by ministers, parliamentary assistants and ministers' office staff.

**MGCS**

**Information, Privacy and  
Archives Division**



**Ontario**

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**GOVERNMENT OF ONTARIO COMMON RECORDS SCHEDULE  
MINISTERS' PUBLIC RECORDS**

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**AUTHORIZATION**

**Government of Ontario Common Records Schedule  
Ministers' Public Records**

*Copy of original signed document available – please contact 416-327-1600.*

  
**James G. Hamilton, Archivist of Ontario**

*March 3, 2015*  
**Date**

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# GOVERNMENT OF ONTARIO COMMON RECORDS SCHEDULE

## MINISTERS' PUBLIC RECORDS

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### 1. INTRODUCTION

The *Archives and Recordkeeping Act, 2006*, SO 2006 c 34 ("the Act") governs the management, destruction and preservation of the electronic and paper records of public bodies.

The requirements of the Act:

- Ensure records related to the activities of all public bodies are available for the benefit of present and future generations; and
- Foster government accountability and transparency by promoting and facilitating good recordkeeping.

The Act defines a public body to include a Minister of the Crown. This means ministers' public records must be managed in accordance with a records schedule approved by the Archivist of Ontario. Ministers' public records are made or received by ministers in the course of carrying out their portfolio responsibilities or roles as members of Cabinet.

The *Common Records Schedule Ministers' Public Records* was developed by the Information, Privacy and Archives Division for use in all ministers' offices. The *Common Records Schedule Ministers' Public Records* classifies ministers' public records into seven records series and sets out how those records should be managed, including how long they must be retained.

#### 1.1 Authority and Approval

The Archivist of Ontario has approved this schedule as the applicable schedule to ministers' offices.

#### 1.2 Recordkeeping Support

Staff in ministers' office should contact their respective deputy ministers' offices if they require advice and guidance with the interpretation and implementation of this schedule.

Recordkeeping resources for ministers can be found on the [Guidance Resources for Ministers' Offices](#) intranet site.

### 2. APPLICATION AND SCOPE

For the purposes of this schedule:

The term "minister" includes:

- Ministers of the Crown;
- Parliamentary Assistants to Ministers;
- Ministers' office staff; and

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- Ministry program area staff, to the extent that they manage public records on behalf of a minister.

The recordkeeping obligations set out in this schedule apply equally to all.

The term "Cabinet" refers to:

- The formal Executive Council, composed of the Ministers of the Crown, including the Premier, appointed by the Lieutenant Governor under the *Executive Council Act*, RSO 1990 c E-25; or
- Cabinet, the advisory body of individuals selected by the Premier, which may include any or all of the Ministers of the Crown.

While technically distinct entities, the terms "Executive Council" and "Cabinet" have generally been used interchangeably in Ontario. The recordkeeping obligations set out in this schedule apply equally to both.

### 2.1 Organization of the Schedule

There are two categories of ministers' public records:

- **Business records** are public records that have ongoing value or usefulness to ministers' portfolio responsibilities or roles as members of Cabinet. They are required to meet legal or fiscal obligations or to document, support or direct government decision-making, policy development, activities or operations.
- **Transitory records** are public records that have no ongoing value or usefulness beyond an immediate and minor transaction or the preparation of a subsequent record. They are not required to meet legal or fiscal obligations or to document, support or direct government decision-making, policy development, activities or operations.

Ministers' public records are categorized into the following series:

- **General Records:** Records relating to the activities of government in the Legislative Assembly, Cabinet and ministry operations, MPP liaison files, policy development and delivery files, interprovincial and federal-provincial relations and meetings, appointment tracking, stakeholder relations and other activities of ministers.
- **Communications Records:** Records relating to media relations and issues management, tours and events and publications files.
- **Correspondence Records:** All formal correspondence sent and received by ministry correspondence services units on ministers' behalves.
- **Cabinet Records:** Records pertaining to ministers' involvement in Cabinet and any of its committees.

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- **Expense Claims Records:** Records relating to the reimbursement for ministers' expenses. Includes records relating to interactions with the Office of the Integrity Commissioner.
- **Administrative Records:** Public records relating to general administrative functions such as human resources or financial management.
- **Transitory Records:** Public records that have no ongoing value or usefulness beyond an immediate and minor transaction or the preparation of a subsequent record. These records are not required by ministers to meet legal or fiscal obligations or to document, support or direct government decision-making, policy development, activities and operations.

## **2.2 Records Originating in Ministries or Other Public Bodies**

Ministers receive public records that originate in their ministry or other public bodies. All public bodies are required to manage the public records of their offices according to their respective records schedules.

However, a public record sent from a minister's office, a ministry or another public body must be kept by the receiving minister if the record relates to government decision-making, policy development, activities or operations and:

- The receiving minister makes a contribution or provided input to the record;
- The receiving minister approves the record; or
- Staff determine that the record is required to document the decisions made or actions taken by the minister or staff on a matter.

Records that are received by ministers as a courtesy or for informational purposes only are transitory records for the purposes of this schedule.

## **2.3 Exemptions in the *Freedom of Information and Protection of Privacy Act***

The *Freedom of Information and Protection of Privacy Act*, RSO 1990, c F-31 ("FIPPA"), operates independently of the *Archives and Recordkeeping Act, 2006* and this records schedule. The obligations and exemptions in FIPPA do not affect or alter the recordkeeping obligations in this schedule.

## **3. EXCLUDED RECORDS**

### **3.1 Ministers' Personal, Political, Caucus and Constituency Records**

Ministers' personal, political and constituency records in any form are excluded from the Act's definition of "public records" and so are excluded from this schedule. They are the personal

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### MINISTERS' PUBLIC RECORDS

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property of ministers and may be saved or disposed of as ministers see fit. Ministers' personal, political and constituency records should be filed separately from ministers' public records.

**Personal records** are made or received by ministers in their capacity as private citizens. They reflect ministers' personal interests and activities.

**Political records** are made or received by ministers in their capacity as members of a political party. These include records related to:

- The Party's participation in elections;
- Matters related to the organization, function, and leadership of the Party, including fundraising and financial matters, conventions, conferences, leadership contests and reviews; and riding nominations; and
- Election campaign records and publications.

**Caucus records** are made or received by ministers as members of a caucus in the Legislative Assembly. These include:

- Records relating to caucus deliberations regarding the business of the Legislative Assembly;
- Records relating to ministers' participation in caucus in the course of carrying out their responsibilities as members of the party; and
- Records prepared by or in the possession of the Government House Leader's Office ("GHLO") that relate solely to the GHLO's roles and responsibilities in managing the general business of the Legislative Assembly and supporting the work of the governing party's caucus in the Assembly and its committees.<sup>1</sup>

**Constituency records**, also known as MPP records, are made or received by ministers in their capacity and in the course of acting as elected representatives of their ridings. They include:

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<sup>11</sup> Records in the possession of a minister's office made by the GHLO related to the development and drafting of government bills and other legislative and policy initiatives are subject to the *Common Records Schedule Ministers' Public Records*. Please see the General Records Series described on page 18.



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- Constituency correspondence and records relating to the needs or concerns communicated by residents of the riding in the minister's capacity as a Member of Provincial Parliament;
- Constituent case files documenting points of contact between the minister and his/her constituents;
- Constituency-related subject files consisting of records dealing with issues related to the constituency but are not related to the minister's portfolio (e.g., speaking notes on constituency matters); and
- Records relating to a minister's participation in the Legislature on matters unrelated to their portfolio responsibilities.

It is important to note that records containing political analysis and advice are public records if they contain information used to document, support or direct government decision-making, policy development, activities or operations. These records need to be dealt with in accordance with the applicable records schedule.

### 3.2 Published Works

The Act excludes published works from the definition of "public record".

Published works are records or extracts of records produced in any form that are made available to the public, generally or by subscription, with or without charge. They include:

- Books;
- Journals;
- Magazines;
- Newspapers;
- Newsletters;
- Reports; and
- Product manuals.

Published works do not include records that are published by ministers' offices, which are included in series *MIN-[ACR]-03 Ministers' Subject Files: Communications Records*.

## 4. UNDERSTANDING THE COMMON RECORDS SCHEDULE

### 4.1 Records Series Identifier

Each records series has a unique identifier that includes the following:

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- The prefix MIN, indicating that the records are covered by the *Common Records Schedule Ministers' Public Records*;
- The acronym that identifies the minister's office (identified in this schedule as [ACR]); and
- The number of the series.

For example, the series number for the Minister of Natural Resources' expense claims records would be MIN-MNR-05.

### 4.2 Description of Records

Each records series includes a description that indicates the records' functions, subject matters, purposes and examples. These descriptions are not meant to be exhaustive. A records series may also include any exclusions and explanatory notes.

### 4.3 Retention Periods

Each records series includes a retention period. This is the length of time relevant records must be retained before their final disposition.

Unless otherwise stated, the retention period begins at the end the calendar year in which the file the particular record relates to is closed. A file is a group of records related to the same subject, issue or activity.

For example, if a minister's office closed a policy file related to amendments to the *Elections Act* in June 2013, the retention period for all records contained in that policy file would begin on December 31, 2013.

#### 4.3.1 File Closure Events

A file may be considered closed when it is used infrequently, records are no longer being added to it or its records are no longer being modified. In the absence of a specified file closure event, staff members should use their best judgement to determine when files are closed. Staff members are not required to close files if they believe the file is still open.

The following are examples of events that may trigger the closure of a file:

- Issue concluded;
- Contract ended;
- Appeal period elapsed;
- Policy superseded or obsolete;
- Negotiations concluded;
- Project completed;

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- Legislation finalized;
- Administrative action completed; or
- Program ended.

Series *MIN-[ACR]-06 Ministers' Administrative Records* specifies the file closure events that close administrative files.

#### **4.3.2 Storage of ministers' public records during their retention periods**

Ministers' public records must be stored on-site in the ministers' office or the ministry program area in shared repositories during their retention periods prior to final disposition. The shared repositories should be organized according to the *File Classification Plan for Ministers' Public Records* which is based on the records series in this schedule.

#### **4.4 Final Disposition**

At the end of their retention periods, ministers' public records must be either:

- **Transferred to the Archives of Ontario:** The Archivist of Ontario may select only those records that are determined to have lasting significance to the history of Ontario for permanent preservation; or
- **Destroy:** Records must be securely destroyed of using methods appropriate to their level of sensitivity and security classification at the end of their retention periods.

Each records series specifies the appropriate final disposition for records covered by that series.

##### **4.4.1 Suspending the *Common Records Schedule Ministers' Public Records***

Any public record in the possession of a minister or a minister's office may be subject to the following:

- An access request made under FIPPA;
- Requests by the Legislative Assembly or one of its committees;
- Legal discovery;
- Public inquiries under the *Public Inquiries Act, 2009*; and
- Other legal proceedings (e.g., NAFTA searches).

Where a request is received pursuant to any of these procedures, the government is legally obligated to preserve and produce all relevant records in accordance with the applicable rules and procedures.

Notification of a request can come through:

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- Legal counsel to the government;
- A freedom of information coordinator;
- The Office of the Secretary of the Cabinet or another office within Cabinet Office; or
- The Archivist of Ontario.

In these cases, the normal application of this records schedule may be suspended until such time as the matter is complete.

Relevant records must not be transferred, altered, destroyed or otherwise disposed of until such time as you have been notified that the matter is concluded.

## **5. RETENTION & FINAL DISPOSITION OF MINISTERS' PUBLIC RECORDS: AN OVERVIEW**

The following chart outlines the retention and disposition of each records series in three circumstances:

- While the minister is in office, including when the minister continues to serve following a general election;
- When there is a change in minister but no change in government; and
- When there is a change in government (i.e., a change in governing party), usually following a general election.

After a Writ of Election drops, ministers remain responsible for managing their public records in accordance with this schedule throughout the Writ period. If there is a change in government, outgoing ministers must ensure that their public records are either transferred or destroyed in accordance with this schedule.

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**RETENTION & FINAL DISPOSITION OF MINISTERS' PUBLIC RECORDS:  
AN OVERVIEW**

Record series	While the minister is in office	Change in minister but no change in government	Change in government
<p><b>MIN-[ACR]-01</b> <b>Ministers' Subject Files: General Records</b></p> <p><b>MIN-[ACR]-02</b> <b>Ministers' Subject Files: Correspondence Records</b></p> <p><b>MIN-[ACR]-03</b> <b>Ministers' Subject Files: Communications Records</b></p> <p><b>MIN-[ACR]-04</b> <b>Ministers' Cabinet Records</b></p>	<p>Four years after the year the file closes. Transfer to the Archives of Ontario.</p>	<p>Records remain for the use of the new minister. No change to retention or disposition.</p>	<p>Transfer immediately to the Archives of Ontario.</p>
<p><b>MIN-[ACR]-05</b> <b>Ministers' Expense Claims Records</b></p>	<p>Seven fiscal years after the fiscal year the file closes. Destroy.</p>	<p>Records remain for the use of the new minister. No change to retention or disposition.</p>	<p>Destroy if claim has been submitted to Chair of Management Board of Cabinet or the Speaker of Legislative Assembly.</p>

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**RETENTION & FINAL DISPOSITION OF MINISTERS' PUBLIC RECORDS:  
AN OVERVIEW**

<b>Record series</b>	<b>While the minister is in office</b>	<b>Change in minister but no change in government</b>	<b>Change in government</b>
<p><b>MIN-[ACR]-06</b> <b>Ministers' Administrative Records</b></p>	<p>Retention periods differ with each type of record. See series below for details.  Destroy.</p>	<p>Records remain for the use of the new minister. No change to retention or disposition.</p>	<p>Records that are not also held in the deputy minister's office: Transfer immediately to the custody of the deputy minister. No change to retention or disposition.  Records that are also held in the deputy minister's office: Destroy immediately.</p>

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### 5.1 Access to the Public Records of a Former Minister

The access and privacy provisions of FIPPA continue to apply to the public records of a minister that are transferred to the Archives of Ontario or are in the custody of a deputy minister's office.

Current ministers will be able to access the archived records of a former minister in the same manner as a member of the general public. This means current ministers will not have access to records that are not available to the general public unless special arrangements have been made.

If a current minister needs to consult the public records of a former minister that have been transferred to the archives or that are in the custody of a deputy minister's office, the minister should contact their deputy minister's office to discuss whether access is possible and under what circumstances.

## 6. RECORDS SERIES

These full records series and descriptions are set out in the following pages.

RECORDS	SERIES TITLE
General Records	<b>MIN-[ACR]-01 Ministers' Subject Files: General Records</b>
Correspondence Records	<b>MIN-[ACR]-02 Ministers' Subject Files: Correspondence Records</b>
Communications Records	<b>MIN-[ACR]-03 Ministers' Subject Files: Communications Records</b>
Cabinet Records	<b>MIN-[ACR]-04 Ministers' Cabinet Records</b>
Expense Claims Records	<b>MIN-[ACR]-05 Ministers' Expense Claims Records</b>

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<b>RECORDS</b>	<b>SERIES TITLE</b>
<b>Administrative Records</b>	<b>MIN-[ACR]-06 Ministers' Administrative Records</b>
<b>Transitory Records</b>	<b>MIN-[ACR]-07 Transitory Records</b>



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**SERIES MIN-[ACR]-01 MINISTERS' SUBJECT FILES: GENERAL RECORDS**

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**1. Description**

Records in any form made or received by the minister relating to the minister's general subject files. This series includes:

**ACTIVITIES OF THE GOVERNMENT IN THE LEGISLATIVE ASSEMBLY**

- **House notes:** House books and issue reports relating to the role of the minister as a member of Cabinet.
- **Statements and questions:** Records made or used by the minister in making statements or responding to questions in the House related to the Minister's responsibilities.
- **Legislation:** Records made or received in the course of preparing legislation for introduction into the Legislative Assembly and guiding it through the legislative process.
- **Records of the Office of the Government House Leader:** Records related to the role of the GHLO in advising the minister on the development and drafting of government bills and other legislative and policy initiatives of the government.<sup>2</sup>

**MPP LIAISON FILES**

- Records made and received in the course of responding to inquiries from constituency offices or members of the Legislative Assembly on issues relating to the minister's role as Minister.

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<sup>2</sup> Note that records of the Government House Leader's Office related purely to the organization of the Legislative Assembly are exempt from the *Common Records Schedule Ministers' Public Records*. See section 3 *Excluded Records* on page 8.

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### **CABINET AND MINISTRY OPERATIONS**

- Records related to the structure and operation of Cabinet and the Committees of Cabinet, including Committee mandates and membership.
- Records related to the mandates of the members of the Executive Council.
- Notes, agendas, minutes and materials related to budget planning and other ministry planning exercises.

### **POLICY DEVELOPMENT AND DELIVERY FILES**

- Records related to the development and delivery of the government's policy and legislative agenda, including:
  - Records related to issues under consideration by the minister that may form part of the government's policy agenda, including submissions from the public on those issues.
  - Records related to the presentation of items before Cabinet or one of its committees, including notes and documents made and received in the course of establishing the minister's position on issues before the Cabinet and notes and other materials relevant to the positions or recommendations of minister's staff on issues before Cabinet.
  - Cabinet documents.
  - Notes relating to discussions at Cabinet or Cabinet committees, including Treasury Board/Management Board of Cabinet.
  - Briefing books and files made or received for use in the planning, implementation or delivery of the government's policy agenda.
  - Records related to meetings involving the Premier, Cabinet Office, Cabinet ministers, ministry staff and members of the public.

### **INTERPROVINCIAL OR FEDERAL-PROVINCIAL RELATIONS AND MEETINGS**

- Records related to the government's relations with Federal, Provincial and Territorial governments.
- Records related to issues under consideration by the minister that may form part of the government's position or priorities with Federal, Provincial and Territorial partners.
- Records related to the minister's participation in meetings with Federal, Provincial and Territorial partners.

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**APPOINTMENT TRACKING**

- Records related to the daily itinerary of the minister, including diaries and journals that record the minister's appointments. Includes paper or electronic records that track or indicate the status of invitations through an appointment approval or scheduling process.

**STAKEHOLDER RELATIONS FILES**

- **Invitations:** Correspondence, notes and messages inviting the minister to partake in events, such as making a presentation to an organization.
- **Telephone calls or meetings records:** Meeting agendas, meeting minutes and notes taken or transcribed from telephone calls or meetings.

**CORRESPONDENCE FILES**

- Records in any form made or received by the minister in response to legislative, policy, program and stakeholder files.

**OTHER ACTIVITIES OF THE MINISTER, including:**

- **Public and prerogative appointments:** Records relating to recommendations for appointments by the minister to government agencies, boards and commissions; advisory bodies; Public Inquiries, and other appointments by or on the recommendation of the minister.
- **Studies, reports and surveys** commissioned by or on behalf of the minister.
- **Grants:** Records made or received in the course of processing and deciding grant requests.
- **Staff meetings:** Agendas, minutes and materials relating to the minister's staff meetings on all matters related to the minister's role as Minister

**2. Exclusions**

This series excludes formal correspondence sent and received by ministry correspondence services units on the minister's behalf, which are covered under *MIN-[ACR]-02 Ministers' Subject Files: Correspondence Records*. This series also excludes Cabinet records covered by *MIN-[ACR]-04 Ministers' Cabinet Records*.

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**3. Retention and Final Disposition**

<b>Circumstance</b>	<b>Retention</b>	<b>Final Disposition</b>
While the minister is in office	4 years after the year the file closes.	Transfer to the Archives of Ontario.
Change in minister but no change in government	Records remain for use of the new minister. 4 years after the year the file closes.	Transfer to the Archives of Ontario.
Change in government	Transfer immediately to the Archives of Ontario.	

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**SERIES MIN-[ACR]-02 MINISTERS' SUBJECT FILES: CORRESPONDENCE RECORDS**

**1. Description**

Records in any form made or received by the correspondence services unit on the behalf of the minister. This series includes:

- **Incoming correspondence:** Incoming correspondence in any form addressed to the minister sent from within or outside the government. Includes memoranda, reports and other documents attached to incoming correspondence.
- **Outgoing correspondence:** Copies of outgoing correspondence in any form sent by the minister to persons and organizations within or outside the government.
- **Indexes and registers:** Indexes or registers that track and provide supporting information relevant to the management of the minister's correspondence. Includes correspondence management systems and other electronic databases.
- **Summary reports:** Reports created by indexes and registers in managing and administering the minister's correspondence.
- **Telephone logs:** Records of incoming telephone calls indicating the person who was called, the caller, nature of query, who will respond, etc.

**2. Retention and Final Disposition**

Circumstance	Retention	Final Disposition
While the minister is in office	4 years after the year the file closes.	Transfer to the Archives of Ontario.
Change in minister but no change in government	Records remain for use of the new minister. 4 years after the year the file closes.	Transfer to the Archives of Ontario.
Change in government	Transfer immediately to the Archives of Ontario.	

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**SERIES MIN-[ACR]-03 MINISTERS' SUBJECT FILES: COMMUNICATIONS  
RECORDS**

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**1. Description**

Records in any form made or received by the minister relating to the minister's communications. This series includes:

**MEDIA RELATIONS AND ISSUES MANAGEMENT FILES**

- **Press releases**
- **Statements and speeches:** Includes speaking notes, key messages, briefing notes and backgrounders.
- **Questions and answers**
- **Communications plans**

**TOURS AND EVENTS FILES**

- **Agendas:** Agendas for tours and events and event summaries prepared for the strategic planning of the minister's public appearances.
- **Statements and speeches:** Records made and used in the preparation of the minister's statements and speeches, such as speaking notes, key messages, briefing notes and backgrounders.

**MINISTERS' PUBLICATIONS FILES**

- **Ministers' records published in any form intended for distribution to the general public.** Includes pamphlets, articles, guides, newsletters, reports and websites and records used in the preparation thereof.

**2. Retention and Final Disposition**

<b>Circumstance</b>	<b>Retention</b>	<b>Final Disposition</b>
While the minister is in office	4 years after the year the file closes.	Transfer to the Archives of Ontario.
Change in minister but no change in government	Records remain for use of the new minister. 4 years after the year the file	Transfer to the Archives of Ontario.

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<b>Circumstance</b>	<b>Retention</b>	<b>Final Disposition</b>
	closes.	
Change in government	Transfer immediately to the Archives of Ontario.	

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**GOVERNMENT OF ONTARIO COMMON RECORDS SCHEDULE  
MINISTERS' PUBLIC RECORDS**

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**SERIES MIN-[ACR]-04 MINISTERS' CABINET RECORDS**

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**1. Description**

Records in any form made or received by the minister pertaining to the minister's involvement in Cabinet and its committees. This series includes:

- **Cabinet minutes;**
- **Cabinet and Cabinet committee submissions, discussion papers, presentations and information items;**
- **Reports and recommendations;**
- **Draft legislation and regulations; and**
- **Advice to ministers on Cabinet activities, including briefing notes.**

**2. Exclusions**

This series excludes records that are copies of authoritative versions of records held by Cabinet Office and do not contain additional input (e.g., new information, annotations, substantive changes or deletions). Cabinet records held by Cabinet Office are managed according to their own records schedule.

**3. Notes**

The *Freedom of Information and Protection of Privacy Act* exemptions for Cabinet records operates independently of the *Archives and Recordkeeping Act, 2006* and this records schedule. The obligations and exemptions in FIPPA do not affect or alter the recordkeeping obligations in this schedule

**4. Retention and Final Disposition**

<b>Circumstance</b>	<b>Retention</b>	<b>Final Disposition</b>
While the minister is in office	4 years after the year the file closes.	Transfer to the Archives of Ontario.
Change in minister but no change in government	Records remain for use of the new minister. 4 years after the year the file closes.	Transfer to the Archives of Ontario.



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**GOVERNMENT OF ONTARIO COMMON RECORDS SCHEDULE  
MINISTERS' PUBLIC RECORDS**

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<b>Circumstance</b>	<b>Retention</b>	<b>Final Disposition</b>
Change in government	Transfer immediately to the Archives of Ontario.	

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**GOVERNMENT OF ONTARIO COMMON RECORDS SCHEDULE  
MINISTERS' PUBLIC RECORDS**

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**SERIES MIN-[ACR]-05 MINISTERS' EXPENSE CLAIMS RECORDS**

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**1. Description**

Records made and received by the minister relating to the reimbursement for expenses. The reimbursement process is governed by the *Cabinet Ministers' and Opposition Leaders' Expenses Review and Accountability Act, 2002*, SO 2002 c 34 Schedule A and the *Rules Governing the Expenses of Cabinet Ministers, Opposition Leaders and Other Persons*. This series includes:

- **Copies of expense claims submitted for reimbursement;**
- **Supporting documents, including the record of items purchased and amounts reimbursed; and**
- **Documents relating to interactions with the Office of the Integrity Commissioner regarding ministerial expenses.**

**2. Notes**

Pursuant to Rule 26 of the *Rules Governing the Expenses of Cabinet Ministers, Opposition Leaders and Other Persons*, ministers must keep two copies of all expense claims submitted for reimbursement along with any supporting documents and a record of the items and amounts reimbursed. Rule 26 also states that designated persons within ministers' offices must provide one copy to the Chair of Management Board of Cabinet or the Speaker of the Legislative Assembly and retain the other copy in their respective offices in the event that it may be required for an audit or such other legitimate purpose.

**3. Retention and Final Disposition**

<b>Circumstance</b>	<b>Retention</b>	<b>Final Disposition</b>
While the minister is in office	7 fiscal years after the fiscal year the file closes.	Destroy.
Change in minister but no change in government	Records remain for the use of the new minister. 7 fiscal years after the fiscal year the file closes.	Destroy.

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**GOVERNMENT OF ONTARIO COMMON RECORDS SCHEDULE  
MINISTERS' PUBLIC RECORDS**

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<b>Circumstance</b>	<b>Retention</b>	<b>Final Disposition</b>
Change in government	Destroy if claim has been submitted to Chair of Management Board of Cabinet or the Speaker of Legislative Assembly.	

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**GOVERNMENT OF ONTARIO COMMON RECORDS SCHEDULE  
MINISTERS' PUBLIC RECORDS**

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**SERIES MIN-[ACR]-06 MINISTERS' ADMINISTRATIVE RECORDS**

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### **1. Description**

This series covers records made or received by ministers for general administrative functions. This series has five subseries, which are described in detail below: Human Resources Records; Accommodations and Moveable Assets Management Records; Financial Management Records; Information Management Records; and General Administration Records.

### **2. Management of Ministers' Administrative Records**

Ministers' administrative records are managed by ministers' offices and in some cases ministry program areas or the Premier's Office. It is very unlikely that ministers' office staff other than office managers or administrators will handle administrative records. The ministers' administrative records managed by ministry program areas or the Premier's Office may be master copies or additional copies of records that are managed within ministers' offices. In addition, ministry program areas or the Premier's office may also manage unique records that are not managed within ministers' offices. For more assistance in determining whether a record is a transitory or a non-transitory public record, please see section 2.2 *Records Originating in Ministries or Other Public Bodies*. Ministry program areas or the Premier's Office must manage the ministers' administrative records that they deal with in accordance with this series.

Only one copy of an administrative record should be kept as the authoritative record. It can be kept in either ministers' offices, or in the Premier's Office, Cabinet Office or ministries where administrative authority has been delegated, unless otherwise indicated in the records series.

### **3. Retention and Final Disposition**

The retention periods for administrative records vary depending on the record type. In certain instances, which are specified in the record descriptions in section 5 of this series, the master copy of a record managed by a ministry program area has a different retention period from the secondary copy managed by a minister's office. Ministers' administrative records also have specified closure events which trigger the closure of a file and the beginning of its respective retention period. The record descriptions provide the retention periods and file closure events for each type of administrative record. All ministers' administrative records should be destroyed at the end of their respective retention periods.

**GOVERNMENT OF ONTARIO COMMON RECORDS SCHEDULE  
MINISTERS' PUBLIC RECORDS**

<b>Circumstance</b>	<b>Retention</b>	<b>Final Disposition for all Administrative Records</b>
While the minister is in office	Varies.	Destroy.
Change in minister but no change in government	Records remain for the use of the new minister.  Varies.	Destroy.
Change in government	Transfer records that are not also held by the deputy minister's office immediately to the deputy minister's custody. No change to retention  Destroy records that are also held by the deputy minister's office immediately.	Destroy.

**4. Record Descriptions**

<b>Record Type and Description</b>	<b>Retention Period</b>
<b>HUMAN RESOURCES RECORDS</b>	
<p><b>Individual Employee Files:</b> Records relating to the work history of ministers' office staff, including:</p> <ul style="list-style-type: none"> <li>• Leaves and absenteeism, e.g., maternity leave, sick leave, vacation</li> <li>• Attendance records</li> <li>• Return to work plans and accommodation plans</li> <li>• Health records and medical documentation</li> <li>• Individual WSIB claims</li> <li>• Oaths and affirmations</li> <li>• Letters of employment, appointment, termination, transfer and resignation</li> <li>• WEAR forms for all transactions</li> </ul>	<p><b>Master copy held by Cabinet Office:</b> 50 years after termination of employment.</p> <p><b>Secondary copy held by the minister's office:</b> 3 years after termination of employment.</p>

**GOVERNMENT OF ONTARIO COMMON RECORDS SCHEDULE  
MINISTERS' PUBLIC RECORDS**

Record Type and Description	Retention Period
<ul style="list-style-type: none"> <li>• Accident and incident reports</li> <li>• Consent to and proof of employee security clearance</li> <li>• Payroll, benefits and pension program enrollment forms, including copies of identification</li> <li>• Completed Government Property Retrieval Forms</li> </ul>	
<p><b>Training and Development:</b> Records relating to training and development of ministers' office staff.</p>	<p>3 years after all administrative actions are completed.</p>
<p><b>Workplace Discrimination and Harassment, Human Rights and Arbitration Employee Case Files:</b> Records relating to official complaints by ministers' office staff, including background material and histories, legal correspondence and investigation reports.</p>	<p>5 years after appeal period and judicial review period have elapsed.</p>
<b>ACCOMMODATIONS AND MOVEABLE ASSETS MANAGEMENT RECORDS</b>	
<p><b>Corporate Accommodations:</b> Records relating to the set-up of ministers' offices and parliamentary assistants' offices and the movement of the ministers' office and parliamentary assistants' staff.</p>	<p>3 years after all administrative actions are completed.</p>
<p><b>Building and Facilities Management:</b> Records relating to the capital improvement and renovation of ministers' offices' buildings and facilities.</p>	<p>3 years after all administrative actions are completed.</p>
<b>FINANCIAL MANAGEMENT RECORDS</b>	
<p><b>Tendered Purchases:</b> Records relating to the tendering process, including Requests for Proposal, Requests for Services, Requests for</p>	<p>7 fiscal years after expiration of contract.</p>

**GOVERNMENT OF ONTARIO COMMON RECORDS SCHEDULE  
MINISTERS' PUBLIC RECORDS**

Record Type and Description	Retention Period
Quotations and Requests for Information.	
<b>Other Purchases – Quotations and Purchase Orders:</b> Records relating to the purchase, lease and rental of materials, equipment, vehicles, services and supplies.	7 fiscal years after all administrative actions are completed.
<b>Budgets and Allocations:</b> Records relating to the preparation of budgets and allocations to cost centres for a fiscal year, including IFIS and CUBE reports.	7 fiscal years after all administrative actions are completed.
<b>Source Documents:</b> Records relating to accounting transactions, including requisitions for payment, cancelled cheque advice forms, cash journal entries, analyses of revenue/expenditure refunds, daily deposit control reports, returned cheques control reports and direct payments and bank transfer advice.	7 fiscal years after all administrative actions are completed.
<b>Accounts Payable:</b> Records relating to accounts payable, including advances, allowances and expenses, cheque production lists, cancelled cheques, interministry and intraministry financial transactions, payables, purchase orders, purchasing cards, reporting, requisitions for payment and vouchers.	7 fiscal years after all administrative actions are completed.
<b>Reconciliations – Financial Control:</b> Records relating to financial control through reconciliations, including repayments to the Ministry of Finance, purchasing card reconciliations and petty cash reconciliations.	7 fiscal years after all administrative actions are completed.
<b>Financial Reporting:</b> Records relating to financial reporting including interim and year-end	7 fiscal years after all administrative actions are completed.

**GOVERNMENT OF ONTARIO COMMON RECORDS SCHEDULE  
MINISTERS' PUBLIC RECORDS**

Record Type and Description	Retention Period
<p>summaries, detailed account listings, trial balances, payroll accounts analyses, master account listings, special purpose accounts and public accounts submissions.</p>	
<p><b>Purchasing and Travel Card Administration:</b> Records relating to the administration of purchasing and travel cards, including the certificate of assurance process. Includes purchasing card statements.</p>	<p>7 fiscal years after all administrative actions are completed.</p>
<p><b>INFORMATION MANAGEMENT RECORDS</b></p>	
<p><b>Recorded Information Management:</b> Records relating to the management of recorded information, including recordkeeping policies such as records schedules and series, active records lists and file classification plans.</p>	<p>3 years after policies superseded or obsolete.</p>
<p><b>Records Transfer Documents:</b> Records relating to the transfer of records to other public bodies, such as Cabinet Office or ministry program areas. Includes tracking sheets for the transfer of administrative records to Cabinet Office and records relating to the transfer of archival records to the Archives of Ontario.</p>	<p>3 years after records transferred.</p>
<p><b>Freedom of Information and Protection of Privacy Act (FIPPA) Files:</b> Records relating to FIPPA, including files or records related to requests for information, privacy complaints and appeals.</p> <p><b>Note:</b> Ministry freedom of information coordinators retain the request, responses and copies of the responsive records. Ministers' offices should</p>	<p>Ministry freedom of information coordinators will manage the records in accordance with their ministry's record schedules.</p>



**GOVERNMENT OF ONTARIO COMMON RECORDS SCHEDULE  
MINISTERS' PUBLIC RECORDS**

Record Type and Description	Retention Period
manage the original responsive records as any other public record.	
<b>GENERAL ADMINISTRATION RECORDS</b>	
<b>Business Continuity and Emergency Planning:</b> Records relating to the program implementation and administration of business continuity and emergency planning. Includes procedures, standards, evaluations, work plans, business impact analyses, risk assessments and emergency planning notifications.	3 years after superseded or obsolete.
<b>Conferences and Meetings:</b> Records relating to staff participation in the organization and administration of conferences and meetings, such as Federal-Provincial-Territorial Meetings or the Council of the Federation.	3 years after all administrative actions are completed.
<b>Mail, Postal and Courier Services:</b> Records relating to mail, postal and courier services, including inter-office mail.	3 years after all administrative actions are completed.
<b>Mailing and Distribution Lists:</b> Includes records used in their development and distribution. Includes holiday lists, budget lists, ministers' offices and deputy ministers' offices contact lists, Throne speech lists and swearing in lists.	1 year after superseded or obsolete.
<b>Security – Personnel:</b> Records relating to the approval and issuance of personnel security passes and building access for staff.  <b>NOTE:</b> Security is maintained by Legislative Security Service and Building Management.	3 years after all administrative actions are completed.

**GOVERNMENT OF ONTARIO COMMON RECORDS SCHEDULE  
MINISTERS' PUBLIC RECORDS**

<b>Record Type and Description</b>	<b>Retention Period</b>
<b>Security – Physical:</b> Records relating to the physical security of buildings, installations, facilities and other areas requiring special protective measures.	3 years after all administrative actions are completed.
<b>Travel Requests and Approvals:</b> Records relating to travel requests and approvals, including completed <i>Request for Permission to Travel Outside of Ontario</i> forms.	3 years after all administrative actions are completed.

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**GOVERNMENT OF ONTARIO COMMON RECORDS SCHEDULE  
MINISTERS' PUBLIC RECORDS**

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**SERIES MIN-[ACR]-07 TRANSITORY RECORDS**

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**1. Description**

Public records made or received by ministers that have no ongoing value or usefulness beyond an immediate and minor transaction. Transitory records are not required by the minister to meet legal or fiscal obligations or to document, support or direct government decision-making, policy development, activities or operations. This series includes:

- **Administrative or courtesy messages:** Messages containing minor administrative or courtesy information, such as confirming meeting times, attendance status (e.g., "I'm on my way" or "I'm calling into the meeting") or requesting a return call.
- **Convenience copies:** Extra or additional copies of a master record, in either the same or different form from the master record, that are only used for convenience or informational purposes and do not contain additional input (e.g., additional information, annotations, substantive changes or deletions). Includes "FYI", "cc" and "bcc" messages that do not initiate or require action. Also includes records that are kept as potential research resources (e.g., white papers).
- **General announcements and notices:** Announcements, notices, memoranda and messages about holidays, charity events, office parties, special events, IT help desk notifications, fire drill notices and newsletters. Also includes advertising and promotional material.
- **Minor drafts:** Drafts that do not show the substantive evolution of decision-making or policy development or provide evidence of activities or operations. Includes drafts that contain only minor changes to a document, e.g., writing style, formatting or spelling.
- **Reference materials:** Unpublished internal resources and tools that are used in the preparation of a subsequent record but do not inform decision-making, policy development, activities or operations. Includes communications guides, annotated bibliographies, research guides, citation guides, writing style guides, formatting guides and technical and software manuals.

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**GOVERNMENT OF ONTARIO COMMON RECORDS SCHEDULE  
MINISTERS' PUBLIC RECORDS**

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## 2. Exclusions

This series excludes drafts that show the substantive evolution of government decision-making or policy development, or provide evidence of government activities or operations.

## 3. Notes

Where a request is received pursuant to any of the procedures described in section 4.4.1 *Suspending the Common Records Schedule Ministers' Public Records*, the normal application of this Schedule may be suspended. Relevant records must not be transferred, altered, destroyed or otherwise disposed of until such time as you have been notified that the matter is concluded.

## 4. Retention and Final Disposition

<b>Circumstance</b>	<b>Retention &amp; Final Disposition</b>
While the minister is in office	Destroy when no longer needed.
Change in minister but no change in government	
Change in minister with change in government	

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**GOVERNMENT OF ONTARIO COMMON RECORDS SCHEDULE  
MINISTERS' PUBLIC RECORDS**

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**APPENDIX A: GLOSSARY OF TERMS**

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**Administrative message:** A message containing minor administrative or courtesy information, such as confirming meeting times, attendance status (e.g., "I'm on my way" or "I'm calling into the meeting") or requesting a return call.

**Caucus record:** A record made or received by a minister as the member of a caucus in the Legislative Assembly.

**Constituency record:** A record made or received by a minister in their capacity and in the course of acting as the elected representative of their riding. Also known as an "MPP record".

**Convenience copy:** A transitory record that is used for informational purposes only and does not contain additional information.

**Destroy:** The secure destruction of records using methods appropriate to its level of sensitivity and security classification.

**Electronic record:** A record that requires a computer or another electronic device to display, interpret and process it.

**File:** A group of records in any format or media that relate to the same subject, issue or activity.

**File classification plan:** A system for organizing records in a shared repository based on subject or categories.

**File closure event:** An event or action that triggers the closure of a file and the start of its retention period.

**Final disposition:** The final action taken with a record when its retention period is over.

**Fiscal year:** The financial year beginning on April 1 and ending on March 31.

**Folder:** An electronic or paper file folder used to store files in shared repositories.

**Ministers' public record:** A record made or received by a minister in the course of carrying out their responsibilities related to their portfolio or role as a member of Cabinet.

**MPP records:** See "constituency record".

**Personal record:** A record made or received by ministers in their capacity as private citizens.

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**GOVERNMENT OF ONTARIO COMMON RECORDS SCHEDULE  
MINISTERS' PUBLIC RECORDS**

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**Political record:** A record made or received by ministers in their capacity as members of a political party.

**Published work:** A record or an extract of a record in any form that is made available in multiple copies to the public, generally or by subscription, with or without charge

**Record:** Information in any form, including a record made, recorded, transmitted or stored in digital form or in other intangible form by electronic, magnetic, optical or any other means, but does not include a mechanism or system for making, sending, receiving, storing or otherwise processing information.

**Record schedule:** An Archivist of Ontario-approved document that identifies and describes the records made and received by public bodies and set out retention periods and final dispositions for those records, the forms in which the records are to be kept and which records are of archival value. Records schedules are organized by records series.

**Record series:** A category of records that are grouped together because they relate to a particular function or subject, or result from the same activity.

**Retention period:** The length of time that closed files must be retained before their final disposition.

**Shared repository:** A storage location for either paper or electronic records that can be accessed by all staff members in a minister's office, with the exception of folders that contain access restrictions.

**Transitory record:** A record that has no ongoing value or usefulness beyond an immediate and minor transaction or the preparation of a subsequent record and is not required by ministers to meet legal or fiscal obligations or to document, support or direct government decision-making, policy development, activities and operations.

**GOVERNMENT OF ONTARIO COMMON RECORDS SCHEDULE  
MINISTERS' PUBLIC RECORDS**

**APPENDIX B: REVISION LOG**

<b>SERIES REVISED</b>	<b>SUMMARY OF REVISION</b>	<b>DATE SIGNED</b>
All series	Simplified 12 series/sub-series into 3 series to clarify implementation. Also clarified instructions for the disposition of records after a change of minister or change of government	April 9, 2002
MIN-400	Series added for ministers' office expense Claims after <i>Cabinet Ministers' and Opposition Leaders' Expenses Review and Accountability Act</i> required ministers' offices to retain a copy of its expense claims. Addition required further instructions for the disposition of expense claims after a change of minister or change of government.	April 4, 2003
None	Revisions to update contact information and web references.	March 1, 2006
None	Revisions to wording in first sentence on page 1 that deals with schedule assisting ministers and ministers' staff. Replaced <i>to take appropriate actions regarding the retention and disposition of Government records in their custody...</i> with <i>...in managing the retention and disposal of Government records in their custody</i> . Also included in parentheses <i>paper and electronic</i> to specify that records include both paper and electronic forms.	July 9, 2007
None	Removed reference (page 8 of previous version) to negotiable retention periods to suit the requirements of each minister's office. Retention periods that appear on schedule have been approved by Archivist of Ontario.	July 9, 2007

**GOVERNMENT OF ONTARIO COMMON RECORDS SCHEDULE  
MINISTERS' PUBLIC RECORDS**

<b>SERIES REVISED</b>	<b>SUMMARY OF REVISION</b>	<b>DATE SIGNED</b>
None	Reformatted document to provide same look and feel as other common schedules. Moved old section 3.1, Series Descriptions and retention schedule to back of document and re-numbered as section 5 (Series Descriptions and Records Retention Schedule).	July 9, 2007
None	Reformatted retention schedule by eliminating the box layout and presenting information in a column layout at back of document.	July 9, 2007
None	Revisions to include references and wording to make it clear that ministers' subject and correspondence files are to be transferred to Archives immediately when there has been a change in minister and change in government as a result of an election. See pages 11 to 14 of schedule.	July 9, 2007
None	Revisions to update contact information and web references. Also included section on "Application of this Schedule on page 7.	July 9, 2007



**GOVERNMENT OF ONTARIO COMMON RECORDS SCHEDULE  
MINISTERS' PUBLIC RECORDS**

<b>SERIES REVISED</b>	<b>SUMMARY OF REVISION</b>	<b>DATE SIGNED</b>
MIN-100 and MIN-200 and MIN-300 and MIN-400	Revisions to ministry retention period to indicate immediate transfer of ministers' subject files (series 100) and correspondence files (series 200) to Archives upon a change in government as a result of an election. In the case of ministers' Cabinet records (series (300) included wording to indicate that the deputy minister take immediate custody of these records on behalf of the Secretary of Cabinet when there has been a change in Government as a result of an election. In the case of ministers' office expense claims (series 400) added wording to ministry retention period field to indicate that expense claims can be disposed of if submitted to Ontario Shared Services whether it is a case of change of minister, no change in government, or a change of minister with a change in government.	July 9, 2007
MIN-200	Revision made to series description field to note that ministers' correspondence includes all correspondence in digital form located in correspondence management systems.	July 9, 2007
Introduction	Updated for consistency with the Government of Ontario Records Schedule Requirements and the Government of Ontario Common Records Series for Transitory Records.  Removed references from sections 2 and 3.1.1 regarding early transfer to the Archives of a predecessor minister's records.	March 16, 2009
All	Changed form of series numbers for consistency with other government Common Records Series.	March 16, 2009

**GOVERNMENT OF ONTARIO COMMON RECORDS SCHEDULE  
MINISTERS' PUBLIC RECORDS**

<b>SERIES REVISED</b>	<b>SUMMARY OF REVISION</b>	<b>DATE SIGNED</b>
All	Combined retention and disposition into one field.  Removed the direction to contact the Archives for electronic records transfer from the disposition field. The direction is stated in section 3.3 of this document.  Minor reformatting and clarifications of text.	March 16, 2009
All	Introduction updated to make it consistent with revised Information Bulletin: Guideline for the Disposition of Ministers' Records.  Minor reformatting and editorial changes made throughout.	August 11, 2011
All	Revision of entire records schedule.	March 2, 2015