

DESCRIPTION	GRADE / AGE	CITATION	RETENTION PERIOD
Indicated on OSR Folder			
Section A – Biographical data – Name, Ontario Education Number (OEN), Student number, Birthdate and Verification checkbox	K-12	Ministry of Education, Ontario Student Record (OSR) Guideline, 2000 (revised 2020)	55 years post-retirement
Section B – Schools Attended	K-12		
Section C – Retirement details	K-12		
Section D – Parent/Guardian Name, Date of Death, if applicable	K-12		
Section E – Special Health Information (as disclosed to the Principal), dated – Heart, Hearing, Sight, Speech, Other with checkboxes	K-12		
Section F – Photographs (Guideline allows to omit based on policy)	K-12		
Section G - Special Achievement in School Activities (Honours and Awards) (Guideline allows to omit based on policy)	K-12		
Section H - Supervised Alternative Learning for Excused Pupils (Now SAL – Supervised Alternative Learning)	14 to 17 years		
The Office Index Card is a component of the OSR and maintained outside of the OSR. Boards should consider their filing practices such as centrally/at schools and by alpha order or year of birth.	K-12	Ministry of Education, Ontario Student Record (OSR) Guideline, 2000 (revised 2020)	55 years post-retirement
CONTENTS OF OSR FOLDER (Filed in reverse chronological order)	GRADE / AGE	CITATION / REFERENCE	RETENTION PERIOD * Subject to superseding and purging when no longer needed
Custody/Access Documentation (Current court order, separation agreement or parenting order)	K-12	Children's Law Reform Act Family Law Act	Until superseded
Wardship Confirmation	K-12	Child, Youth and Family Services Act, 2017	Until superseded
1. ASSESSMENTS			

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Ontario Student Transcript (Secondary) - maintained electronically until the student has graduated, transferred or retired.	Sec	OSR Guideline, 2000 Ontario Student Transcript (OST) Manual, 2013	55 years post-retirement
Report Cards <ul style="list-style-type: none"> Paper copies of all pages, signed by the principal are filed in the OSR 	1-12	OSR Guideline, 2000 Growing Success: Assessment, Evaluation and Reporting in Ontario Schools (2010), Ministry of Education	5 years post-retirement
Kindergarten Communication of Learning	JK & SK	OSR Guideline, 2000 Growing Success, Kindergarten Addendum 2016	5 years post-retirement
Diploma (OSSD, OSSC, Certificate of Accomplishment), if undelivered	Gr 12 or Age 18		5 years post-retirement
Record of French Instruction	K-8	A Framework for French as a Second Language in Ontario Schools, Kindergarten to Grade 12	5 years post-retirement
2. DOCUMENTATION FILE CONTENTS		OSR Guideline, 2000	
Student Registration and/or Eligibility Attestation Form (for newcomers and International Students, as applicable) to verify pupil's eligibility to attend. <ul style="list-style-type: none"> Student Registration and Attestation form (FS-22-H) 	K-12	Enrolment Register Instructions	5 years post-retirement
Kindergarten Parent Survey/ Questionnaire (optional)	K		To end of primary years
Community Involvement Log – Secondary Only	9-12	Ministry of Education PPM No.124a	5 years post-retirement,
Prevalent Medical Conditions (Anaphylaxis, Asthma, Diabetes, and/or Epilepsy) documentation <ul style="list-style-type: none"> Plan of Care 	K-12	PPM 161 – Supporting Children and Students with Prevalent Medical Conditions (Anaphylaxis, Asthma, Diabetes, and/or Epilepsy) in Schools	Plan of Care is superseded or reviewed every school year. Final Plan of Care is retained 5 years post-retirement.

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<p>Home Instruction Letter with the principal's approval and assigned teacher.</p> <p>Home instruction to be provided for a pupil were,</p> <ul style="list-style-type: none"> (a) medical evidence that the pupil cannot attend school is provided to the principal; and (b) the principal is satisfied that home instruction is required. <p>The student is considered to be enrolled in classes/ courses the school.</p> <ul style="list-style-type: none"> • Form IS-07-K 	K-12	<p>Enrolment Register Instructions</p> <p>Home Instruction: Ontario Regulation 298 Operation of Schools Section 11(11) Duties of Principals</p>	Minimum retention is Current year + 2 years, same as enrolment records.
<p>Homeschooling annual notification from parents and board's acknowledgement of the notification</p> <p>Students are excused from attendance at school.</p> <p>An OSR may never have been created for these students and it is not necessary for the notification to be filed by the student.</p> <p>IS-18-HS Notice of Intent to Home School</p>	K-12	Policy/Program Memorandum No. 131	
<p>Prolonged Absence Form</p> <p>Principal notification, Attendance Counsellor acceptance and notification to remove student from register documentation</p>	K-12	<p>Education Act, Part 2 School Attendance</p> <p>Enrolment Register Instructions</p>	Current year + 2 years
<p>Prior Learning Assessment & Recognition (PLAR) Cumulative Tracking Record</p>	10-12	Ministry of Education PPM No.132	5 years post-retirement
<p>Credit Recovery Learning Plan</p>	9-12	<p>No direct reference – see information in Programs for Student Success or in Growing Success (page 89)</p> <p>Ontario Schools: Kindergarten to Grade 12: Policy and Program Requirements, 2016 (page 80)</p>	If approved, retain with the Credit Recovery Profile until the credit is recovered and the final mark entered into SIS.

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Compulsory Credit Deferral/Substitution <ul style="list-style-type: none"> IS-03-S 	9-12	Ontario Schools: Kindergarten to Grade 12: Policy and Program Requirements, 2016 (page 69) Ontario Student Transcript (OST) Manual 2013 references requirements for recording compulsory credit substitutions. PPM 132 Prior Learning Assessment and Recognition for Mature Students – Revised Mandatory Requirements	5 years post-retirement
Request For Accommodating a student: Withdrawn from Core French <ul style="list-style-type: none"> IS-11-C 	K-12		
Credit Counselling Summary	9-12	No apparent reference, related to graduation requirements	5 years post-retirement
Appendix A Tool to Identify a Suspected Concussion	K-12	Education Act, R.S.O, 1990 sec.321 <u>Specific link</u> to concussions in Ed Act sec 321 Rowan’s Law (Concussion Safety), 2018 S.O. 2018 - Bill 193 Ministry of Education PPM No.158 WRDSB Concussion Management Protocol	5 years post-retirement
Appendix C Documentation of Medical Examination Form			
Appendix E Documentation/Permission to Return to Learn/Return to Physical Activity			
Concussion Code of Conduct for Athletes and Parents/Guardians (for athletes under 18 years of age)			
Attendance Counselling referral letter <ul style="list-style-type: none"> SES-11-AA 	K-12	Education Act , Part 2 School Attendance	
Exemption and Accommodation Letters (e.g. French, EQAO) Exemption From Instruction Related to The Human Development and Sexual Health Expectations	K-12	Ontario Human Rights Commission EQAO Home Page Policy/Program Memorandum 162	5 years post-retirement

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<ul style="list-style-type: none"> Form IS-20-HPE Request for Faith and Religious Accommodation Form for Students <ul style="list-style-type: none"> Form IS-12-02 Student Request for Accommodation - Name and Gender <ul style="list-style-type: none"> Form IS-21-01 			
2.1 Consents		See **IPC Resource for MFIPPA personal information guidance (linked after table)	
Letter of request to Correct / Delete an OSR Record if a request is not granted	K-12	OSR Guideline, 2000 MFIPPA, Education Act	5 years post-retirement
Change of Surname by Repute Letter or Form	K-12	OSR Guideline, 2000	5 years post-retirement
Legal Name Change documentation - attestation / verification form	K-12	Application to Change a Child's Name	
Consent to Access and Share the OSR (for access to board staff), may be related to Parent Consent for Services (Special Education form)	K-12	OSR Guideline, 2000 MFIPPA, Education Act	
Consent to Release Information to a Third Party	K-12	OSR Guideline, 2000 MFIPPA	
Students at the Age of Majority – Consent for Information Sharing (including any parent portal access) <ul style="list-style-type: none"> Form IS-18-BB 	Age 18	OSR Guideline, 2000 MFIPPA, Education Act	5 years post-retirement
Withdrawal from Parental Control: Students at Ages 16 & 17 <ul style="list-style-type: none"> Form SES-10-SW 	Aged 16&17	OSR Guideline, 2000 MFIPPA, Education Act	5 years post-retirement
Authorization Of Non-Guardian Access to Student/ Information (Day-To-Day Activities Only) <ul style="list-style-type: none"> Form IS-19-NG 	K-12	OSR Guideline, 2000 MFIPPA, Education Act	Superseded
2.2 Special Education		Ministry resource webpage	http://www.edu.gov.on.ca/eng/policyfunding/funding.html
SEA (Special Equipment Amount) Individual Equipment Form	K-12	Search Ontario.ca Education Funding –	5 years post-retirement

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professional's recommendation form with reference to the assessment SEA Device Agreement		Special Education Grant – Funding Guidelines for the current Special Equipment Amount (SEA) also subject to MFIPPA and PHIPA	
Individual Education Plan (IEP)	K-12	Individual Education Plans, Ministry of Education Special Education in Ontario, Kindergarten to Grade 12: Policy and Resource Guide (2017), Ministry of Education	Superseded + 1 year
Transition Plans (included as part of IEP process) must be in the OSR	Gr 8	Special Education in Ontario, Kindergarten to Grade 12: Policy and Resource Guide (2017), Ministry of Education PPM 156 Supporting Transitions for Students with Special Education Needs	5 years post-retirement
Identification, Placement, and Review Committee (IPRC) Determinations, Decisions of Review and/or Appeal <ul style="list-style-type: none"> • SES-06-IPRC-A IPRC Invitation/Notification form outlining date/time/place of IPRC meeting. • SES-06-IPRC-B IPRC Determination form to be completed at end of IPRC meeting. • SES-06-IPRC-C IPRC Student Educational Profile (Educational Assessment) • SES-06-IPRC-D IPRC Annual Review Waiver 	K-12	O. Reg. 181/98 Identification and Placement of Exceptional Pupils Individual Education Plans, Ministry of Education Special Education in Ontario, Kindergarten to Grade 12: Policy and Resource Guide (2017), Ministry of Education	5 years post-retirement
Parent Consent for Services	K-12		5 years post-retirement

2.3 Professional Support Assessments (OSR copy)

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<ul style="list-style-type: none"> • Educational • Psychological • Speech and Language • Communication Assessments 	K-12	OSR Guideline, 2000 (copies) Ministry of Education - Policy/Program Memorandum No. 81 (1984): Provision of health support services in school settings	5 years post-retirement
2.4 English Language Learners (ELL)			
English Language Learners (ELL) Initial Assessment, and Program Adaptation Plan	K-12	From Ontario.ca Special Education Ontario Policy and Resource Guide Kindergarten to Grade 12 – English Language Learners - For more information on policy concerning English language learners, see English Language Learners/ESL and ELD Programs and Services: Policies and Procedures for Ontario Elementary and Secondary Schools, Kindergarten to Grade 12 (2007) . For additional resource information, see Supporting English Language Learners: A Practical Guide for Ontario Educators, Grades 1 to 8 (2008) .	5 years post-retirement
English Language Learners (ELL) Achievement Report	K-12		
2.5 Alternative Programs including Experiential Learning			
Supervised Alternative Learning (SAL) records in the OSR - A SAL Plan (SALP) is retained in the Documentation Folder Attendance records are outside the OSR records pertaining to the SAL committee meetings administered following Ontario Regulation 374/10 are maintained outside the OSR	14 to 17 years	Enrolment Register Instructions Supervised Alternative Learning (SAL): Policy and Implementation, 2010 Ontario Regulation 374/10 Supervised	5 years post-retirement Records outside the OSR are retained as enrolment records for Current year + 2 years. Trustee committee meeting documentation is retained

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		Alternative Learning and Other Excusals from Attendance at School	for the life of the board + 5 years
Dual Credit Program School Within a College (SWAC), others	Gr 11, 12	Dual Credit Program	5 years post-retirement
Specialist High Skills Major (SHSM)	Secondary	Specialist High Skills Major	
Ontario Youth Apprenticeship Program (OYAP)	Gr 11, 12	Education Amendment Act (Learning to Age 18), 2006, S.O. 2006, c. 28 - Bill 52 Ontario Youth Apprenticeship Program (OYAP)	
Work Education Agreement (Co-op) - OSR copy copies may exist outside of the OSR - retained 1 year past the termination of the agreement	Minimum 14 years old	PPM 76A Workplace Safety and Insurance Coverage for Students in Work Education Programs	5 years post-retirement
2.6 SAFE SCHOOLS		O. Reg. 472/07: BEHAVIOUR, DISCIPLINE AND SAFETY OF PUPILS	
Safety Plan Behaviour Plan	K-12	Occupational Health and Safety Act (ontario.ca) Workplace Violence in School Boards - A Guide to the Law (ontario.ca)	Superseded Minimum – one year from last use
Physical Intervention (Containment) Report	K-12	Occupational Health and Safety Act (ontario.ca)	Current year + 1 year

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<p>Safe Schools Incident Reporting (SSIR) form for reporting serious student incidents with a violent incident indicated by a checkbox on the form (also an electronic report).</p> <p>Part 1 is the submission and Part 2 is the acknowledgement from the principal back to the person making the report.</p> <p>The principal proceeds with an investigation and documents their findings and consideration then determination of discipline imposed.</p> <p>If the principal has decided that action must be taken as a result of a serious student incident, they will file a copy of the reporting form with documentation indicating the action taken in the Ontario Student Record of the student whose behaviour was inappropriate.</p>	<p>K-12 and note suspension of JK-3 students</p>	<p>Education Act s.300.2, also refer to Education Act for activities to consider suspension per 306(1) and expulsion per 310(1) Suspension Of Elementary School Pupils https://www.ontario.ca/laws/regulation/200440</p> <p>PPM 145 – Progressive Discipline and Promoting Positive Student Behaviour</p> <p>PPM 144 Bullying Prevention and Intervention Behaviour, Discipline and Safety of Pupils: Ontario Regulation 472/07</p> <p>Caring and Safe Schools in Ontario, 2010 - Supporting Students With Special Education Needs Through Progressive Discipline, K-12</p> <p>OSR Guideline, 2000</p> <p>PPM 120 Reporting Violent Incidents to the Ministry of Education</p>	<p>Minimum – one year from last use</p> <p>The SSIR form. (Kept in ebase) Current year + 1 year</p> <p>OSR Storage</p> <p>If the principal has identified the incident as violent and if the student engaged in the incident the reporting form must be retained in that student's OSR with information about any other students redacted for:</p> <ul style="list-style-type: none"> ● one year, if the student's suspension was quashed or withdrawn and the record of suspension expunged. <p>Documentation of any other action taken (other than suspension or expulsion) must also be retained for this period.</p> <ul style="list-style-type: none"> ● three years, if the student was suspended for the violent incident. ● five years, if the student was expelled for the violent incident.
<p>Suspension and Expulsion documentation</p> <p>Not in the OSR but may be retained at the school.</p> <p>Note specific records, including:</p> <ul style="list-style-type: none"> ● Principal’s Report ● Post Investigation ● Referral Hearing ● Request for Readmission <p>Note: Some records are directed to the Superintendent of Education, the Director, and the Board of Trustees and retained differently.</p>	<p>Gr. 4-12</p>	<p>See above references. Youth Criminal Justice Act</p> <p>Bill 157: Keeping Our Kids Safe at School Act</p> <p>Bill 168: Violence and Harassment in the Workplace</p> <p>Bill 13: Accepting Schools Act</p>	<p>Suspension: E+3 years, E= suspension</p> <p>Expulsion: E+ 5years E= expulsion</p>

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<p>Exclusion letter (Further documentation retained by principal outside of the OSR)</p>	K-12	<p>Education Act Section 265(1)(m) PPM 145 – Progressive Discipline and Promoting Positive Student Behaviour Enrolment Register Instructions</p>	Current year + 1 year
<p>Suspension and Expulsion Education (non-academic and academic) Program records for the OSR, as applicable</p>	Gr. 4-12	<p>PPM 141 – School Board Programs for Students on Long-Term Suspension (edu.gov.on.ca) PPM 142 – School Board Programs for Expelled Students (edu.gov.on.ca)</p>	5 years post-retirement
<p>Threat Risk Assessment Summary forms (Stage 2)</p>	K-12	<p>PPM 120 Reporting Violent Incidents to the Ministry of Education PPM 145 – Progressive Discipline and Promoting Positive Student Behaviour Youth Criminal Justice Act Bill 157: Keeping Our Kids Safe at School Act Bill 168: Violence and Harassment in the Workplace Bill 13: Accepting Schools Act, 2012</p>	<p>5 years post-retirement</p> <p>Records related to the Youth Criminal Justice Act are not to be retained in the OSR (YCJA)</p>

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Request for a Service Animal	K-12	Accessibility for Ontarians with Disabilities Act Education in Ontario: policy and program direction: Policy/Program Memorandum 163	

* **Documents may be removed at the principal’s discretion when no longer conducive to the student’s improvement of instruction ([per section 9, OSR Guideline](#))**

If certain information or material in an OSR folder is determined, according to the board's policies, to be no longer conducive to the improvement of the instruction of the student, the principal will have the information or material removed from the OSR folder. Such information will be given to the parent(s) of a student who is not an adult or to the student if the student is an adult, or it will be destroyed (see [section 8](#)).

** **IPC Resource** [A Guide to Privacy and Access to Information in Ontario Schools](#), January 2019 (Information and Privacy Commissioner of Ontario)