

Records Retention Schedule (1133-01)

Approved:
AHS Records Retention Schedule

Records and Information Management (RIM@ahs.ca)

May 2025

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Introduction

The Records Retention Schedule provides a list of official records that must be retained for a specific period of time in compliance with regulatory and legislative requirements, as well as a list of records for preservation as part of the organization's historical collections. This applies to records in any medium of record (paper, electronic, or hybrid).

The Records Retention Schedule identifies how to classify records (*record code*), when the retention growth of a record starts (*closure rule*), how long records must be retained (*total retention*), and what to do with records that have met their defined retention period (*final disposition*). The Records Retention Schedule has been organized by function or theme – retention codes within a specific function may apply to multiple departments or programs.

Departments and programs whose records are identified in the Records Retention Schedule shall comply with the retention periods within. Where multiple retention periods exist within a single record source and application of multiple record codes is not feasible, the highest watermark retention period shall be applied. Prior to destruction of any official records, the [Official Record Destruction Procedure](#) must be followed.

Contact RIM@ahs.ca for guidance and support on records management and retention.

Records & Information Management Policies

- Records Management Policy (#1133)
- Official Records Destruction Procedure (#1133-02)
- Transitory Records Procedure (#1133-03)
- Legal Hold Procedure (#1133-04)
- Electronic Records Conversion and Migration Recordkeeping Procedure (#1133-05)
- Electronic Signatures Policy (#1190)
- Scanning & Digitization Policy (#1191)

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0100 Governance

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Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
0110	Governance	Accountability	Information related to the documentation of responsibility for operational and administrative functions from an organizational structure perspective.	Date record inactive, retired or replaced	5 years	Destroy	Government of Alberta Retention Schedule - Administrative Records (ARDA): s. 0110
0120	Governance	Board/Official Administrator	Information created by or used by the Board/Official Administrator to provide oversight, direction and governance to the organization. Internal documents. Note: Send public Board packages to Records & Information Management for historical keeping.	Date of meeting, record or decision	11 years	Destroy	Canadian Business Corporations Act: s. 20(2.1) and s. 21.1(5) Alberta Business Corporations Regulation: s. 26 Limitations Act: s. 3 and s.11
0122	Governance	Chief Executive Administration	Information created by or used by the CEO to provide oversight, direction and governance to the organization. Includes meeting documentation.	Date of record or meeting	11 years	Destroy	Canadian Business Corporations Act: s. 20(2.1) and s. 21.1(5) Alberta Business Corporations Regulation: s. 26 Limitations Act: s. 3 and s.11
0130	Governance	Meetings	Information related to meetings held by the organization. Includes meeting organization, discussion and decision making by teams, committees, working groups, task forces, and leadership groups. Excludes meetings related to the Board, Health Care Authority, CEO and formal project/build/renovation.	Date of meeting	5 years	Destroy	Government of Alberta Retention Schedule - Administrative Records (ARDA): s. 0175 and s. 0255
0150	Governance	Planning and Decision Making	Information related to the management, planning, and delivery of department and program services. Excludes meetings; planning/decisions from Board, Health Care Authority, CEO or formal project/build/renovation; business continuity planning; and financial planning.	Date of record	11 years	Destroy	Limitations Act: s. 3 and s.11

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Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
0160	Governance	Policy/Procedure Management	Information related to the development, acceptance, and review of policies, procedures, standards, guidelines and protocols that give direction to the organization in conducting its operations and in providing services. Includes department specific processes and guidelines. Note: Send published policies, available to the general public, to Records & Information Management for historical keeping.	Date record inactive, retired, or replaced	11 years	Destroy	Limitations Act: s. 3 and s.11

0200 Legal

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Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
0210	Legal	Legal Advisory	Information related to the provision of legal services and advice to the organization.	Date submitted to client, case closed, or matter resolved	11 years	Destroy	Limitations Act: s. 3 and s.11 Law Society of Alberta: Practical Realities of File Storage
0220	Legal	Contract Management	Information related to the contracting of essential goods and services.	Date contract terminated	11 years	Destroy	Limitations Act: s. 3 and s.11
0230	Legal	Litigation	Information requested or produced to support the organization before, during and after a trial or hearing.	Date case closed or abandoned	11 years	Destroy	Limitations Act: s. 3 and s.11 Law Society of Alberta: Practical Realities of File Storage

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Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
0240	Legal	Intellectual Rights Management	Information related to the organization's intellectual property rights including branding, patents, and trademarks.	Date rights inactive, retired, or replaced	20 years	Destroy	Patent Act: s. 44 Trademarks Act: s. 29.1 and s.46

0300 Risk Management

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Record Code	Function	Sub function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
0310	Risk Management	Business Continuity and Disaster Planning	Information related to contingency planning for the continuation of operations and response in the event of natural and man-made disasters or events that affect critical business functions. Includes floods, fires, vandalism, terrorism, strikes etc. Excludes communications related to disaster planning and response.	Date plan inactive, retired or replaced	5 years	Destroy	Government of Alberta Retention Schedule - Administrative Records (ARDA): s. 0190
0320	Risk Management	Incident Reporting, Investigations - Adults	Information related to identification, investigation, and reporting of employee, volunteer, patient or client incidents and concerns. Excludes patient care and treatment records.	Date of incident or concern	11 years	Destroy	Limitations Act: s. 3 and s.11 Occupational Health and Safety Act: Part 7 s. 33(7) Occupational Health and Safety Code: Part 11 s.183
0321	Risk Management	Incident Reporting, Investigations - Minors	Information related to identification, investigation, and reporting of employee, volunteer, patient or client incidents and concerns. Excludes patient care and treatment records.	Date of incident or concern (Date of birth used to calculate retention)	28 years of age	Destroy	Limitations Act: s. 3 and s.11 Occupational Health and Safety Act: Part 7 s. 33(7) Occupational Health and Safety Code: Part 11 s. 183
0330	Risk Management	Insurance Claims	Information related to insurance claims and reporting. Includes claims related to loss, theft, damage, or accident.	Date of claim or report	11 years	Destroy	Limitations Act: s. 3 and s.11

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0340	Risk Management	Insurance Coverage	Information related to insurance coverage and support. Excludes insurance claims and employee benefit plans; and occurrence-based policies.	Date coverage inactive, retired or replaced	11 years	Destroy	Limitations Act: s. 3 and s.11
0341	Risk Management	Insurance Coverage – Occurrence Based Policies	Information related to insurance occurrence-based policy coverage and support.	Date coverage inactive, retired or replaced	29 years	Destroy	Limitations Act: s. 3 and s.11
0350	Risk Management	Quality Assurance/Improvement	Information related to studying, assessing, and/or evaluating the provision of services for quality improvement, health system planning, and accreditation purposes. Includes the process completed and results obtained.	Date of record	10 years	Destroy	Canadian Standards Association – Cells, Tissues and Organs for Transplantation Z900.1-17: s.4.3.1.3 Government of Alberta Retention Schedule - Administrative Records (ARDA): s. 0300
0360	Risk Management	Quality Control	Information related to validating that a product or service adheres to a defined set of criteria and/or requirements.	Date of record	5 years	Destroy	Waste Control Regulation: s. 20 Health Canada Blood Regulations: s. 119-121 Canadian Standards Association - Blood and Blood Components: Z902: Table 4 and s. 20.6.4.3 Guide of Alberta's Radiation Protection Program: s. 4.6 Occupational Health and Safety Code: s. 291.5(1)(b) Alberta Radiation Protection Regulation: s. 4(1)(b) Safety Code 35 – Radiation Protection in Radiology: Large Facilities: s. 4.2 College of American Pathologists CPSA Guidance for Medical Clinics s. 11.5.2

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Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
0370	Risk Management	Driver Files	Information related to drivers employed or contracted by the organization. Excludes information part of the Human Resources employee record.	Date record created, established, or received	5 years	Destroy	Commercial Vehicle Certificate & Insurance Regulation: s. 43(1)

0400 Communications

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Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
0410	Communications	Communications	Information related to planning, delivery, and content for communication within the organization and with external entities. Includes clinical and administrative communication. Note: Send media releases and corporate or clinical communications released to the general public to Records & information Management for historical keeping.	Date of record	11 years	Destroy	Limitations Act: s. 3 and s.11
0430	Communications	Events Coordination	Information related to the planning and organization of events, tours, ceremonies and other venues by the organization or its business representatives.	Date of event	2 years	Destroy	Government of Alberta Retention Schedule - Administrative Records (ARDA): s. 0345 and s. 0350
0470	Communications	Media Monitoring	Information related to the review and monitoring of media outlet inquires or reports in development of a corporate level media response. Note: Send media or press releases to Records & information Management for historical keeping.	Date review complete	2 years	Destroy	Government of Alberta Retention Schedule - Administrative Records (ARDA): s. 0330

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0500 Education

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Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
0510	Education	Nursing Programs - Legacy	Information related to formal nursing programs where a legacy hospital provided educational training.	Date of graduation or termination of program	50 years	Destroy	Post-Secondary Learning Act
0540	Education	Training	Information related to administration and tracking of training functions and activities within the organization. Includes training content. Includes training provided internally and to the public.	Date of record; date training content inactive, retired or replaced.	3 years	Destroy	Government of Alberta Retention Schedule - Administrative Records (ARDA): s. 1375 and s. 1380 College of American Pathologists

0600 Facilities & Asset Management [\[return to Table of Contents\]](#)

Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
0610	Facilities & Asset Management	Asset Management	Information related to the acquisition of physical assets such as buildings, land, vehicles and equipment. Excludes contracts, finalized architectural plans, software licenses, and financial documents.	Date asset is inactive, retired, or replaced.	5 years	Destroy	Government of Alberta Retention Schedule - Administrative Records (ARDA): s. 0530 and s.1035 Permit Regulation: s. 23
0615	Facilities & Asset Management	Architectural Drawings & Plans - As Built	Architectural drawings, blueprints, and plans. Includes significant changes or add-ons to original (as issued) drawings, blueprints, and plans. Excludes IT architectural plans. Note: Send facility and hospital level architectural drawings, plans, and blueprints to Records & Information Management for historical keeping.	Record is inactive, retired, or replaced.	11 years	Destroy	Limitations Act: s. 3 and s.11

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Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
0620	Facilities & Asset Management	Builds, Renovations, Formal Projects	Information related to planning, build, management, and implementation of projects by the organization and its representatives. Includes renovations, capital builds, space planning/allocation and formal projects. Excludes finalized hospital/facility architectural plans, contracts and RFPs for successful bidders.	Date build/renovation/project completed, closed or abandoned	11 years	Destroy	Limitations Act: s. 3 and s.11
0630	Facilities & Asset Management	Utilities	Information related to utility plans and consumption by the organization. Includes natural gas, electricity, steam, chilled water, and water/sewage. Excludes payments covered by Finance - Accounts Payable.	Date of record	2 years	Destroy	Government of Alberta Retention Schedule - Administrative Records (ARDA): s. 0595
0640	Facilities & Asset Management	Equipment/Vehicle Inspection and Maintenance	Information related to the inspection and maintenance of equipment and vehicles. Excludes medical devices and equipment.	Date of record	5 years	Destroy	ISO Standard 13485 – Medical Devices – Quality Management Systems: s.4.2.5 Government of Alberta Retention Schedule - Administrative Records (ARDA): s. 1050 Ground Ambulance Regulation: s. 32(2)
0645	Facilities & Asset Management	Medical Device Inspection and Maintenance	Information related to the inspection and maintenance of medical device (equipment). Excludes calibration, equipment manuals, and cleaning.	Device inactive, retired or replaced	2 years *For medical device tracking, if unable to do retention per item, high watermark of 20 years applied.	Destroy	ISO Standard 13485 – Medical Devices – Quality Management Systems: s. 4.2.5 ISO Standard 15189 – Medical Laboratories Requirements for Quality and Competence: s.5.3.1.7 CPSA Standard for Diagnostic Laboratory Accreditation: s.G.4.0.18 College of American Pathologists

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Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
0660	Facilities & Asset Management	Physical Access Control	Information related to the administration and tracking of physical access control mechanisms. Includes visitor clearance to restricted areas. Excludes security surveillance tapes and system/application access.	Date of record	11 years	Destroy	Limitations Act: s. 3 and s.11
0661	Facilities & Asset Management	Parking	Information related to the provision of parking services.	Date of record	2 years	Destroy	Government of Alberta Retention Schedule - Administrative Records (ARDA): s. 0565
0670	Facilities & Asset Management	Property Cleaning & Waste Management	Information related to property and site cleaning and waste management.	Date of record	5 years	Destroy	Waste Control Regulation: s. 39(1)
0680	Facilities & Asset Management	Property Management	Information related to the maintenance and repair of buildings and sites. Excludes builds, renovations, space allocations, and cleaning/waste management.	Date of record	10 years	Destroy	Government of Alberta Retention Schedule - Administrative Records (ARDA): s. 0580

0700 Finance

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Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
0710	Finance	General Ledger	General Ledger or other book of final entry containing the summaries of the year-to-year transactions of the organization. Includes information that supports transactions in the General Ledger.	Fiscal year end (taxation year end)	6 years	Destroy	Canada Income Tax Regulation: s. 5800(1)(c) Canadian Income Tax Act: s. 230(4)
0715	Finance	Accounts Payable	Information related to the receipt, approval, payment, and reporting of accounts payable on behalf of the organization for goods or services rendered.	Fiscal year end (taxation year end)	6 years	Destroy	Canada Income Tax Act: s. 230(4)

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Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
0720	Finance	Accounts Receivable	Information related to the receipt, review, processing, and reporting of accounts receivable on behalf of the organization.	Fiscal year end (taxation year end)	6 years	Destroy	Canada Income Tax Act: s. 230(4)
0725	Finance	Banking	Information related to establishment and administration of bank accounts used by the organization.	Fiscal year end (taxation year end)	6 years	Destroy	Canada Income Tax Act: s. 230(4)
0726	Finance	Unclaimed Cheques	Information related to unclaimed and stale dated cheques issued by Accounts Payable and Payroll Departments.	Date of cheque	10 years	Destroy	Alberta Unclaimed Personal Property Act: s. 13
0730	Finance	Budget/Financial Planning and Reporting	Information related to financial and budget status, forecasting, planning, and analysis. Includes annual, quarterly, and ad hoc financial planning and reporting.	Fiscal year end (taxation year end)	6 years	Destroy	Canada Income Tax Act: s. 230(4)
0735	Finance	Capital Assets	Information related to the purchase of capital assets used by the organization in provision of its services. Includes equipment, real estate, land, and buildings.	Fiscal year end (taxation year end)	6 years	Destroy	Canada Income Tax Act: s. 230(4)
0740	Finance	Client Trusts	Information related to establishment and operation of client trust funds.	Fiscal year end (taxation year end)	6 years	Destroy	Canada Income Tax Act: s. 230(4)
0760	Finance	Grants/Funding	Information related to financial support provided from or received to the organization. Includes grants, loans, bursaries, or similar awards of financial aid.	Fiscal year end (taxation year end)	6 years	Destroy	Canada Income Tax Act: s. 230(4)
0770	Finance	Distribution of Materials/Supplies	Information related to the receipt, distribution and tracking of materials and supplies. Includes mail, courier, and transportation records.	Date of record	2 years	Destroy	Government of Alberta Retention Schedule - Administrative Records (ARDA): s. 1000 and s. 1045

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Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
0780	Finance	Procurement	Information related to the request for and acquisition of equipment, supplies, goods, and services. Excludes capital assets.	Fiscal year end (taxation year end)	6 years	Destroy	Canada Income Tax Act: s.230(4)
0790	Finance	Taxation	Information related to taxation matters at all levels of the organization. Includes records provided to employees for the purpose of individual tax returns.	Fiscal year end (taxation year end)	6 years	Destroy	Canada Income Tax Act: s.230(4) Excise Tax Act: s. 286(3)

0800 Human Resource Management [\[return to Table of Contents\]](#)

Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
0805	Human Resource Management	Benefits	Information related to employee salary, wage and benefit determination and administration.	Date of record; date plan inactive, retired or replaced	3 years	Destroy	Employment Standards Code: s.15 Freedom of Information & Protection of Privacy Act: s.35(b)
0815	Human Resource Management	Medical Affairs	Information related to the administration of medical staff. Excludes Medical Staff Rules & Bylaws	Date clinician terminated, retired or deceased	7 years	Destroy	Employment Insurance Act: s.87(3) Employment Standards Code: s.15 Freedom of Information & Protection of Privacy Act: s.35(b) Limitations Act: s. 3(1)(a) Canada Pension Plan: s. 24(2)
0820	Human Resource Management	Position Management	Information related to the workforce administration, evaluation, and classification/development of job positions within the organization.	Date position retired or updated	3 years	Destroy	Employment Standards Code: s.15

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Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
0825	Human Resource Management	Employee Administration	Information related to the administration of individuals employed by the organization. Includes employee record.	Date employee terminated, retired or deceased	7 years	Destroy	Employment Insurance Act: s.87(3) Employment Standards Code: s.15 Freedom of Information & Protection of Privacy Act: s.35(b) Limitations Act: s. 3(1)(a) Canada Pension Plan: s. 24(2)
0826	Human Resource Management	Laboratory Staff Competency and Accreditation Records	Information related to the training, competency, and accreditation of Laboratory Transfusion Medicine and Cellular Therapy staff.	Date employee terminated, retired or deceased	10 years	Destroy	Canadian Standards Association: Z902 Table 4; s. 20.6.4.2 Foundation for the Accreditation of Cellular Therapy: s. D13.4
0830	Human Resource Management	Employee Health Surveillance – Asbestos, Silica or Coal Dust	Information related to employee positive exposure to asbestos, silica, or coal dust. Excludes patient care and treatment records.	Date of assessment	30 years	Destroy	Occupational Health and Safety Code: s. 40(4) Freedom of Information & Protection of Privacy Act: s.35(b) Limitations Act: s. 3 and s.11
0835	Human Resource Management	Employee Health Surveillance	Information related to an employee health surveillance within the workplace. Excludes patient care and treatment records and positive exposure to asbestos, silica, or coal dust.	Date of record	5 years	Destroy	Occupational Health and Safety Code: s. 20(4), s. 58, s.220(2)(b) and s. 291.5(1) Freedom of Information & Protection of Privacy Act: s.35(b) Limitations Act: s. 3 and s.11
0840	Human Resource Management	Labour Relations	Information related to the methods for and tracking of labour issues, including employee grievances, complaints, and disciplinary/incident reporting. Excludes employee specific grievances, disciplinary reviews, and incidents captured as part of the employee record.	Date of record	2 years	Destroy	Freedom of Information & Protection of Privacy Act: s.35(b) Limitations Act: s. 3(1)(a)
0845	Human Resource Management	Labour Relations - Collective Bargaining	Information related to collective bargaining and union activities.	Date of record; date agreement inactive, retired or replaced.	2 years	Destroy	Freedom of Information & Protection of Privacy Act: s.35(b) Limitations Act: s. 3(1)(a)

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Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
0850	Human Resource Management	Payroll	Information related to the review, approval, and processing of employee payroll. Excludes employee tax information (i.e., T4).	Fiscal year end (taxation year end)	6 years	Destroy	Canadian Income Tax Act: s.230(4) Employment Insurance Act: s.87(3) Freedom of Information & Protection of Privacy Act: s.35(b) Employment Standards Code: s.15 Canada Pension Plan: s. 24(2)
0855	Human Resource Management	Pension	Information related to the administration of pension plans and agreements.	Date plan inactive, retired, or replaced	50 years	Destroy	Canada Pension Plan: s. 24(2) Employment Pension Plans Act: s. 34 Freedom of Information & Protection of Privacy Act: s.35(b)
0860	Human Resource Management	Performance Management	Information related to the management of performance planning and appraisal processes.	Date of record	2 years	Destroy	Limitations Act: s. 3(1)(a)
0865	Human Resource Management	Recruitment	Information related to the analysis of candidates against a specified position profile to evaluate the suitability of individuals for employment. Excludes offer letter kept as part of the employee record.	Date of record	1 year	Destroy	Freedom of Information and Protection of Privacy Act: s.35(b)
0870	Human Resource Management	Staff Scheduling	Information related to staffing rotations and schedules. Excludes employee timecards.	Date of record	3 years	Destroy	Employment Standards Code: s.15
0880	Human Resource Management	Volunteer/ Practicum Administration	Information related to the acceptance, management, and supervision of volunteers and practicum students. Excludes student records collected or produced by an educational institute.	Date volunteer/ student is terminated, retired or deceased.	7 years	Destroy	Limitations Act: s. 3(1)(a) Freedom of Information and Protection of Privacy Act: s.35(b) Business requirement = align with employee records

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Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
0895	Human Resource Management	Workplace Health & Safety	Information related to workplace health and safety inspections and assessments. Excludes incident reporting and investigation, and meetings.	Date of inspection or assessment	3 years	Destroy	Occupational Health and Safety Code: Part 11 s.183(3), Freedom of Information and Protection of Privacy Act: s.35(b)

0900 Information Management [\[return to Table of Contents\]](#)

Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
0910	Information Management	Access & Privacy - Health Information (HIA)	Information related to requests for access or correction of personal information or health information under the <i>Health Information Act (HIA)</i> . Excludes abandoned requests.	Date request completed or closed	10 years	Destroy	Health Information Act: s. 9(1), s. 41(2) and s. 56.6(2)
0911	Information Management	Access & Privacy - Health Information (HIA) Abandoned Requests	Information related to abandoned requests for access or correction of personal information or health information under the <i>Health Information Act (HIA)</i> .	Date request abandoned	5 years	Destroy	Health Information Act: s. 10 Legal recommendation
0915	Information Management	Access & Privacy - Personal Information (FOIP)	Information related to requests for access or correction of personal information under the <i>Freedom of Information and Protection of Privacy Act (FOIP)</i> . Includes abandoned requests.	Date request completed, closed or abandoned	5 years	Destroy	Government of Alberta Retention Schedule - Administrative Records (ARDA): s. 0890 Freedom of Information and Protection of Privacy Act: s. 8, s. 10, s. 35, and s. 55
0930	Information Management	Forms Management	Information related to the analysis, design and final versions of forms approved for use within the organization. Forms developed and approved by Forms Strategy & Management.	Date of record; date form inactive, retired or replaced	2 years	Destroy	Government of Alberta Retention Schedule - Administrative Records (ARDA): s. 0880

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Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
0940	Information Management	Information Assessments – Privacy & Security	Information related to assessing security and privacy controls in information administrative practices and systems pertaining to individually identifiable information.	Date assessment inactive, retired, or replaced	11 years	Destroy	Health Information Act: s. 64 Limitations Act: s. 3 and s.11
0960	Information Management	Information Disposition and Destruction	Information related to the final disposition or destruction of data that is required to be retained as per the Records Retention Schedule.	Date record created or received	Permanent		Government of Alberta Retention Schedule - Administrative Records (ARDA): s. 0985 Limitations Act: s. 3 and s.11

1000 Information Technology

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Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
1010	Information Technology	Service Management	Information related to the receipt, tracking and fulfillment of information technology support service tickets. Excludes patient chart corrections.	Date request fulfilled, closed or abandoned	1 year	Destroy	Freedom of Information and Protection of Privacy Act: s. 35
1020	Information Technology	System Administration and Development	Information related to the design, creation and management of networks, hardware, software, technology applications. Excludes formal projects and equipment maintenance.	Date application inactive, retired or replaced	3 years	Destroy	Government of Alberta Retention Schedule - Administrative Records (ARDA): s. 0835
1030	Information Technology	System Back-up	Back-up system data retained for a limited period of time to enable data recovery and migration activities.	Date of back-up or user verification	30 Days	Destroy	Government of Alberta Schedule: Backup Systems 2003/043-A001

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Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
1040	Information Technology	Access Administration and Auditing – HIA	Requests for access and auditing of access in applications and databases containing health and personal information covered by the <i>Health Information Act (HIA)</i> . Example: Clinical Information System.	Date of record	10 years	Destroy	Health Information Act: s. 56.6
1041	Information Technology	Access Administration & Auditing – FOIP	Requests for access and auditing of access in applications and databases containing personal information covered by the <i>Freedom of Information and Protection of Privacy Act (FOIP)</i> . Example: Human Resources Information System.	Date of record	5 years	Destroy	Freedom of Information and Protection of Privacy Act: s. 10 and s. 35 Government of Alberta Retention Schedule - Administrative Records (ARDA): s. 0890
1042	Information Technology	Digital Identity	Information related to an individual and their digital presence (accounts, credentials, entitlements).	Date employee/volunteer/student is terminated, retired or deceased.	6 years	Destroy	Employment Standards Code: s. 15 Limitations Act: s. 3(1)(a) Freedom of Information and Protection of Privacy Act s. 35 Health Information Act s. 56.6

1100 Historical Collections [\[return to Table of Contents\]](#)

Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
1150	Historical Collections	Historical Collections – Public Board Administration	Information related to Board or Health Care Authority meetings, resolutions, and decisions which are made accessible to the general public.	N/A	Permanent	Permanently retained by AHS Archives & Historical Collections	

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Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
1151	Historical Collections	Historical Collections – Public Policy/ Procedure	Published rules, bylaws, policies, procedures, standards, guidelines, directives, and protocols made available to the general public that give direction to the organization in conducting operations and provision of services. Excludes department level processes not endorsed or approved via the organization's Policy Department	N/A	Permanent	Retained permanently by AHS Archives & Historical Collections	
1152	Historical Collections	Historical Collections – Public Communications – Corporate & Clinical	Published corporate and clinical communication, guidance, materials and publications developed/endorsed by the organization's Communications Department and made available to the general public. Excludes materials not created through Communications Department	N/A	Permanent	Retained permanently by AHS Archives & Historical Collections	
1153	Historical Collections	Historical Collections – Media Releases & Public Announcements	Public announcements and media releases by the organization's Communications Department.	N/A	Permanent	Retained permanently by AHS Archives & Historical Collections	
1154	Historical Collections	Historical Collections – Hospital/Facility Architectural Drawings & Plans	Facility and hospital level architectural drawings, blueprints, and plans no longer in use by the organization.	N/A	Permanent	Retained permanently by AHS Archives & Historical Collections	
1155	Historical Collections	Historical Collections – Other	Artefacts, books and vital records (not identified elsewhere) that provide value to the organization's history and corporate memory; and are intended for sharing with researchers and the general public.	N/A	Permanent	Retained permanently by AHS Archives & Historical Collections	

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1200 Health Services

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Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
1205	Health Services	Client Navigation	Information related to client placement, scheduling, and tracking information. Excludes referrals where the patient was seen and ADT registries.	Date of record	11 years	Destroy	Limitations Act: s. 3 and s. 11 Freedom of Information and Protection of Privacy Act: s. 35
1210	Health Services	Client Registries	Information related to client registries containing birth, death, and Admission Discharge Transfer (ADT) information.	Date of record	When all associated clinical records have met their retention (high watermark = 75 years)	Destroy	Hospitals Act: s. 15 Operations of Approved Hospitals Regulations: s. 15(1) Limitations Act: s. 3 and s.11
1215	Health Services	Communicable Disease Reporting	Information related to communicable/infectious disease identification, surveillance, reporting, and control activities. Includes pandemics, immunizations, and food poisoning. Excludes patient care records. Note: Send statistics/communications released to the general public to Records & Information Management for historical keeping.	Date report or document created	10 years	Destroy	Government of Alberta Retention Schedule - Public Health: s. 04 (6550). S. 16 (6800) and s. 23 (6910)
1260	Health Services	Patient/Client Records - Adult	Information and media related to patient assessment, diagnosis, screening and treatment in acute care, ambulatory, and community settings. Adults. Excludes patient care records from genetic/genomic departments, tuberculosis departments, syphilis/HIV records from STI department, and tissue/organ donor records. Note: Psychological SST raw data maintained as separate record.	Date of visit closure or discharge	11 years	Destroy	Hospitals Act: s. 15 Operations of Approved Hospitals Regulations: s. 15(1) Limitations Act: s. 3(1) Organ & Tissue Transplant Accreditation: s. 17.5

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AHS Records Retention Schedule

Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
1262	Health Services	Patient/Client Records - Minor	<p>Information and media related to patient assessment, diagnosis, screening and treatment in acute care, ambulatory, and community settings. Minors.</p> <p>Excludes patient care records from genetic/genomic departments, Tuberculosis departments, syphilis/HIV records from STI departments, and tissue/organ donor records.</p> <p>Note: Psychological SST raw data maintained as separate record.</p>	Date of visit closure or discharge (note: date of birth used to calculate retention)	28 years of age	Destroy	<p>Hospitals Act: s. 15</p> <p>Health Facilities Regulation: s. 9</p> <p>Operations of Approved Hospitals Regulations: s. 15(1)</p> <p>Limitations Act: s. 5.1(2)</p> <p>Organ & Tissue Transplant Accreditation: s. 17.5</p>
1263	Health Services	Patient/Client Records - Genetics	<p>Information on the assessment, diagnosis, screening, and treatment of clients requiring molecular genetic testing and review by specialized genetic/genomic departments.</p> <p>Excludes genetic/genomic records from Lab and departments not dedicated to genetic/genomic clients.</p>	Date of visit closure or discharge	75 years	Destroy	<p>Hospitals Act: s. 15</p> <p>Operations of Approved Hospitals Regulations: s. 15(1)</p> <p>Limitations Act: s. 3 and s.11</p> <p>Privacy Commissioner of Canada – Genetic Testing and Privacy: Pages 61-64</p> <p>Business requirement to maintain 3 generations of data = 75 years</p>
1264	Health Services	Tuberculosis, Syphilis, and HIV Records	<p>Information related to diagnosis, assessment and treatment of tuberculosis, syphilis, and HIV patients seen in a Tuberculosis or STI Department.</p>	Date of visit closure or discharge (note: date of birth used to calculate retention)	100 years of age	Destroy	<p>Hospitals Act: s. 15(1)</p> <p>Operations of Approved Hospitals Regulations: s. 15(1)</p> <p>Limitations Act: s. 3 and s.11</p> <p>Alberta Health Retention Schedule – Tuberculosis Records</p> <p>Business requirement = 100 years of age.</p>

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Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
1265	Health Services	Health Product Distribution	Information related to the request for, distribution, inspection, stocking, and preparation of health products. Excludes blood products and medical devices.	Date of record	4 years	Destroy	Alberta College of Pharmacy – Standards for the Operation of Licensed Pharmacies: s. 5.4.1 (d) Narcotic Control Regulations: s.29, s. 40.1 and s. 63(b) Benzodiazepines and other Targeted Substances Regulations: s. 75 Food and Drugs Act: s. 32(1) Food and Drugs Regulations: s. C.01.041.2(1), s. C.02.022(1) and s. G02.077
1270	Health Services	Pharmacy Records – Administration & Preparation	Information related to the request, processing, preparation, and provision of pharmaceutical drugs and products by AHS Pharmacy.	Date of record	10 years	Destroy	Alberta College of Pharmacy – Standards for the Operation of Licensed Pharmacies: s. 5.4.1 (d), s. 5.4.1 (e) Narcotic Control Regulations: s. 40.1 Benzodiazepines and other Targeted Substances Regulations: s. 75 Food and Drugs Regulations: s. C.01.041.2(1) Pharmacy and Drug Regulations: s. 34(4)
1290	Health Services	Radiological Records	Information related to acquisition, storage, use and disposal of radiological materials.	Date of record, expiry or revocation of license	3 years	Destroy	General Nuclear Safety and Control Regulations: s. 28(1) and (2) Nuclear Substances and Radiation Devices Regulations: s. 36(3) and (4)

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Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
1295	Health Services	Donor Records	<p>Information related to living and deceased donors. Includes information pertaining to the evaluation, tracking and procurement of specimens, cells, tissues, and organs for the purposes of transplant.</p> <p>Excludes transplant recipient records.</p>	Date of distribution, disposition or expiration	30 years	Destroy	<p>Accreditation Canada – Organ Donation for Living Donors Standards v13.1: s. 18.10</p> <p>Accreditation Canada – Organ and Tissue Donation for Deceased Donors Standards v13.1: s. 15.5</p> <p>Safety of Human Cells, Tissues and Organs for Transplantation Regulations: s. 62(1)</p> <p>Canadian Standards Association Z900.1.22 – Cells, tissue and organs for transplantation – General requirements: s. 7.3.5</p> <p>Eye Bank Association of America Medical Standards: s. M1.100</p> <p>Safety of Sperm and Ova Regulations: s. 78(1), s. 82 and s. 83(2)</p> <p>Limitations Act: s. 3(1) and s.5.1(2)</p>

1300 Laboratory Services [\[return to Table of Contents\]](#)

Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
1302	Laboratory Services	Anatomical Pathology – Autopsy & Surgical Pathology Blocks & Slides - Minors	Blocks and slides related to testing and diagnosis of patient tissues from Alberta Children's Hospital (ACH).	Date of specimen	30 years	Destroy	<p>They Royal College of Pathologists – Retention & Storage of Pathological Records & Specimens</p> <p>Canadian Association of Pathologists</p> <p>College of American Pathologists: Lab Record Retention; Anatomical Pathology Checklist (Accreditation)</p> <p>Lab Leadership consensus of retention period</p>

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AHS Records Retention Schedule

Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
1304	Laboratory Services	Anatomical Pathology – Cytopathology Gynecological & Non-Gynecological Blocks & Slides	Blocks and slides related to testing and diagnosis of patient cytology cases. Excludes negative/unsatisfactory gynecological blocks and slides	Date of specimen	30 years	Destroy	They Royal College of Pathologists – Retention & Storage of Pathological Records & Specimens Canadian Association of Pathologists College of American Pathologists: Lab Record Retention; Anatomical Pathology Checklist (Accreditation) Canadian Society of Cytopathology
1310	Laboratory Services	Anatomical Pathology Reports	Information related to the diagnosis of disease based on the gross, microscopic, chemical, immunologic, and molecular examination of organs, tissues, and whole bodies. Excludes autopsy and genetic reports.	Date of report	30 years	Destroy	They Royal College of Pathologists – Retention & Storage of Pathological Records & Specimens Canadian Association of Pathologists College of American Pathologists: Lab Record Retention; Anatomical Pathology Checklist (Accreditation) Operations of Approved Hospitals Regulations: s. 15(1) Health Facilities Regulation: s. 9 Limitations Act: s. 3 and s.11
1311	Laboratory Services	Anatomical Pathology – Autopsy & Surgical Pathology Blocks & Slides	Blocks and slides related to testing and diagnosis of patient tissues. Excludes ACH blocks and slides; cytopathology gynecological and non-gynecological blocks and slides.	Date of specimen	21 years	Destroy	They Royal College of Pathologists – Retention & Storage of Pathological Records & Specimens Canadian Association of Pathologists College of American Pathologists: Lab Record Retention; Anatomical Pathology Checklist (Accreditation) Lab Leadership consensus of retention period

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Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
1313	Laboratory Services	Anatomical Pathology - Cytopathology Gynecological Negative/ Unsatisfactory Blocks & Slides	<p>Cytopathology gynecological blocks and slides related to testing and diagnosis of patient tissues where the result was either negative or unsatisfactory.</p> <p>Excludes positive and abnormal blocks and slides.</p>	Date of specimen	5 years	Destroy	College of American Pathologists: Lab Record Retention
1315	Laboratory Services	General Reports - Adults	<p>Information related to general laboratory procedures. Adult records.</p> <p>Excludes anatomical pathology and genetic reports.</p> <p>Note: For reports related to minors, use record code 1262.</p>	Date of report	11 years	Destroy	<p>Operations of Approved Hospitals Regulation: s. 15(1)</p> <p>Health Facilities Regulation: s. 9</p> <p>Limitations Act: s. 3 and s.11</p> <p>Canadian Association of Pathologists</p> <p>The Royal College of Pathologists – Retention & Storage of Pathological Records & Specimens</p>
1319	Laboratory Services	Genetic Testing Reports - Adults	<p>Information related to somatic genetic testing. Includes results and reports. Adult records.</p> <p>Excludes lab test supporting documentation i.e. worksheets and heritable/germline genetic testing.</p> <p>Note: For reports related to minors, use retention code 1262.</p>	Date of report	20 years	Destroy	<p>CCMG Practice Guideline: Laboratory guidelines for next generation sequencing</p> <p>CCMG Guideline for retention of Cytogenetic Specimens and Genetic Analysis Records and Molecular Specimens and Genetic Analysis Records</p> <p>College of American Pathologists – Cytogenetics (Accreditation)</p> <p>Royal College of Pathologists: s. 133</p> <p>Operations of Approved Hospitals Regulation: s. 15(1)</p> <p>Health Facilities Regulation: s. 9</p> <p>Limitations Act: s. 3 and s.11</p>

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Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
1320	Laboratory Services	Heritable/Germline Testing Reports	Information related to heritable or germline testing. Includes results and reports. Excludes lab test supporting documentation. I.e. worksheets and somatic genetic testing reports.	Date of record	75 years	Destroy	Operations of Approved Hospitals Regulation: s. 15(1) Health Facilities Regulation: s. 9 Limitations Act: s. 3 and s.11 Business requirement to retain 3 generations of data = 75 years
1322	Laboratory Services	Laboratory Result Supporting Documentation - Genetics	Information used to support and generate a patient result report related to genetic/genomic, and heritable/germline testing.	Date of record	20 years	Destroy	CCMG Guideline for retention of Cytogenetic Specimens and Genetic Analysis Records and Molecular Specimens and Genetic Analysis Records
1323	Laboratory Services	HPTA Records	Information related to Human Pathogens & Toxins Act (HPTA) laboratory operational records. Excludes HPTA biosafety and biosecurity incident records.	Date of record	5 years	Destroy	Human Pathogens & Toxins Regulation – Canada: s. 29(1)
1324	Laboratory Services	HPTA Records – Biosafety and Biosecurity Incidents	Information related to Human Pathogens & Toxins Act (HPTA) biosafety and biosecurity incidents involving regulated materials, regulated animals, security breaches, or failure of or compromise to biocontainment. Applies to licensed laboratories.	Date of record	10 years	Destroy	Human Pathogens & Toxins Regulation – Canada: s. 29(2)
1325	Laboratory Services	Requisitions – Non-CAP/ASHI Accredited Laboratories	Requisitions for laboratory testing, examination, or consultation. Excludes requests related to CAP and ASHI accredited laboratories, anatomical pathology, newborn screening, and genetic testing.	Date of request	3 months	Destroy	The Royal College of Pathologists – Retention & Storage of Pathological Records & Specimens.
1326	Laboratory Services	Requisitions – Anatomical Pathology	Requisitions for testing, examination or consultation related to anatomical pathology.	Date of request	2 years	Destroy	Canadian Association of Pathologists.

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Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
1327	Laboratory Services	Requisitions and Specimens – Newborn Screening Program	Requisitions and blood specimens for testing related newborn screening. Excludes newborn screening reports.	Date of request/ specimen	15 years	Destroy	Clinical Laboratory Standards Institute (CLSI) Lab Leadership consensus on retention period
1330	Laboratory Services	Requisitions – CAP and ASHI Accredited Laboratories	Requisitions for laboratory testing, examination or consultation related to CAP and ASHI accredited laboratories.	Date of request	2 years	Destroy	College of American Pathologists: Lab Record Retention ASHI Standard D.2.1.4
1332	Laboratory Services	Ethanol Inventory Tracking	Information related to ethanol inventory tracking.	End of calendar year	6 years	Destroy	Canada Excise Act: s. 31
1335	Laboratory Services	Laboratory Result Supporting Documentation	Information used to support and generate a patient result report. Excludes supporting documentation related to genetic testing.	Date of record	5 years	Destroy	College of American Pathologists – Various Checklists (Accreditation) Canadian Standards Association: Z902: Table 4 & s. 20 6.2.6
1340	Laboratory Services	Laboratory Transfusion Records	Information related to distribution, transfusion, recall, and final disposition of blood components and blood products (derivatives).	Date of record	50 years	Destroy	Health Canada Blood Regulations: Tables 119-122 Canadian Standards Association: Z902-20 Blood and Blood Components Standard: Tables 4 and 5 College of American Pathologists: Lab Record Retention Note: Autologous blood transfusions require a 10-year retention period. These are rare, so Lab has recommended application of the higher watermark for all transfusion records.

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Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
1353	Laboratory Services	Transfusion Medicine – Pre-Transfusion Specimens	Information related to the date and time a recipient blood specimen was drawn and phlebotomist identification.	Date of record	1 year	Destroy	Canadian Standards Association: Z902-20 Blood and Blood Components Standard: Table 5
1357	Laboratory Services	Transfusion Medicine – Investigations	Information related to the identification, investigation, and reporting of unexpected or serious reactions, errors or accidents related to blood product transfusion. Includes blood transfusions, blood transformations, autologous blood, and allogeneic blood.	Date case closed or abandoned	11 years	Destroy	Health Canada Blood Regulations: Tables 119–122 College of American Pathologists: Lab Record Retention Limitations Act: s. 3
1360	Laboratory Services	Transfusion Medicine – Blood Component Transformation	Information related to the washing, pooling, or irradiation of blood.	Date of record	10 years	Destroy	Health Canada Blood Regulations – s. 121 Table
1364	Laboratory Services	Transfusion Medicine - Critical Supplies	Information related to Transfusion Medicine critical supplies and qualifications.	Date of record	3 years	Destroy	Health Canada Blood Regulations: Tables 119-121
1365	Laboratory Services	Transfusion Medicine – Blood Component & Product Shipping Records	Information related to packaging, shipping, and receipt of blood products.	Date of record	1 year	Destroy	Health Canada Blood Regulations: Tables 119-122

1500 Public Health [\[return to Table of Contents\]](#)

Record Code	Function	Sub function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
1520	Public Health	Public Health Inspections	Information related to inspections of land, property, schools, care facilities, restaurants, health centres, personal service facilities, hotels/motels, rental housing locations, and public recreation sites. Includes testing water supplies, food supplies and other environmental factors (air, soil, waste, etc.) to identify potential environmental or health hazards. Excludes confirmed contaminated sites.	Date of inspection or issue resolution	11 years	Destroy	Limitations Act: s. 3 and s.11 Alberta Health Retention Schedule – Public Health: s. 7250, s. 7400, s. 7500 and s. 7550

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Record Code	Function	Sub function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
1540	Public Health	Public Health Inspections – Contaminated Sites	Information related to the inspection of confirmed contaminated sites.	Date of inspection or issue resolution	20 years	Destroy	<p>Limitations Act: s. 3 and s. 11</p> <p>Alberta Health Retention Schedule – Public Health: s. 7250, s. 7400, s. 7500 and s. 7550</p> <p>Legal recommendation to retain longer than other public health inspection records = 20 years.</p>

1600 Research

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Record Code	Function	Sub Function	Description	Closure Rule	Total Retention	Final Disposition	Legal Reference
1610	Research	Research Administration	Information related to the administration of research & clinical trials permitted or endorsed by the organization.	Date research completed or REB expiry/ closure	15 years	Destroy	<p>Research Ethics Board's Operational Policy Framework</p> <p>Limitations Act: s.3</p>
1620	Research	Non-Health Canada Regulated Research Studies	<p>Information related to research led by the organization that are not subject to Health Canada regulations.</p> <p>Excludes source patient care records and clinical trials records.</p>	Date research completed	7 years	Destroy	Alberta Innovates - Clinical Research Roadmap
1630	Research	Clinical Trials	<p>Information related to Health Canada regulated clinical trials managed by the organization. Includes investigations of medical devices, natural health products or drugs involving human subjects to review effects, identify any adverse events, or ascertain safety or efficacy.</p> <p>Excludes source patient care records.</p>	Date of record or when research completed	15 years	Destroy	<p>Health Canada Food and Drug Regulations: s. C.05.012(4)</p> <p>Government of Canada Notice: Period reduced for keeping clinical trial records for drugs and natural health products – Canada.ca</p>

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RRS Record of Amendment

Approval Date	Amendment
December 2011	0170 – Governance Reporting
	0321 - Risk Management – Incident Reporting, Investigations – Minors
	0500 – Education
	1220 – Communicable Diseases – Tuberculosis & Syphilis
	1230 – Communicable Diseases – Immunizations – Minors
	1241 – Diagnostic Imaging & Testing – Clinical Trials
	1242 – Diagnostic Imaging & Testing – Minors
	1256 – EMS Patient Records – Minors
	1261 – Patient/Client Records – Clinical
	1262 – Patient/Client Records – Minors
	1263– Patient Client Records – Genetic Clinical Records
	1265 – Health Services – Pharmaceutical Management – Distribution
	1285 – Psychological Testing Reports - Minors
February 2014	0110, 1310 – Updated Description and Legal Reference
	0370, 1311, 1313, 1314, 1321, 1322, 1326, 1327, 1350, 1355, 1364 – Driver Records New Record Code added
	0870 – Updated Description, Notes and Legal Reference
	1320 – Updated Sub function, Description and Final Disposition
	1325 – Updated Sub function, Description and Closure Rule
	1330 – Updated Description
	1335 – Updated Total Retention
	1340 – Updated Description, Total Retention and Final Disposition
	1610, 1630 – Updated Notes
	1620 – Updated Notes, Total Retention and Final Disposition
May 2014	0360,0550,1310,1311,1313,1315,1320,1325,1335 - Removal of Reference to “College of Physicians & Surgeons of Alberta as Legal Reference
	1326,1327 & 1330 – Change Closure rule to Month end/Service Date
August 2014	1325, 1326, 1330 – Updated Description
November 2014	0610, 0680 – Updated Description
	0880 – Updated Description and Notes
	1302, 1304 – New Record Code added
	1311 – Updated Description, Total Retention and Legal Reference
	1313 – Updated Sub function, Description and Total Retention
	1314 – Updated Sub function, Description and Legal Reference
February 2015	1430 – Updated Description
	0710 – Updated Description and Notes
	0711, 0726 – New Record Code added
February 2021	1314 – Updated Total Retention
	0110, 0645, 1410 – Updated Closure Rule
	0170, 0420, 0430, 0440, 0450, 0460, 0470, 0805, 0915, 0930, 0940, 1140, 1235 – Updated Total Retention
	0240, 0510, 0520 – Updated Total Retention and Final Disposition

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Approval Date	Amendment
	0320, 1340 – Updated Legal Reference and Description
February 2021	0321 – Updated Description, Closure Rule, Total Retention and Legal Reference
	0480, 0855 – Updated Total Retention, Closure Rule and Final Disposition
	0530, 0660 – Updated Notes
	0540, 0960 – Updated Sub function and Description
	0550, 0650, 0675, 0810, 1220, 1225, 1240, 1255, 1280, 1230, 1242, 1256, 1285, 1241, 1245, 1314 – Record Codes Retired
	0630 – Updated Total Retention and Description
	0780, 1210, 1215, 1332, 1364 – Updated Description
	0865, 1310 – Updated Legal Reference
	0950 – Updated Sub function, Description, Total Retention and Final Disposition
	1260 – Updated Description, Notes and Final Disposition
	1262 – Updated Description, Notes, Closure Rule, Total Retention and Final Disposition
	1264, 1323, 1353, 1357 – New Record Code added
	1302 – Updated Sub function, Description and Closure Rule
	1311 – Updated Sub function, Description and Total Retention
	1330 – Updated Sub function and Legal Reference
	1355 – Updated Sub function, Description, Total Retention and Legal Reference
	1360, 1365 – Updated Sub function
	1420 – Updated Final Disposition
November 2021	0645 – Updated Closure Rule and Legal Reference
March 2022	1310 – Updated Description
December 2024	All codes – updated descriptions, inclusions, and legal references; and clarified closure rules
	Retention timelines changed: 120,130,160,240,350,370,430,470,540,610,615, 630,645,670,680,710, 715, 720, 725, 726,730, 735, 745,760,770,780,790,805,815,820,825,830,835,840,845,850, 860,865,870,880,895,910,930,940,1010,1030,1040,1210,1215,1263, 1264,1265,1270,1290,1320,1322,1323,1326,1540,1620,1630
	New codes: 122,341,661,911,1041,1150,1151,1152,1153,1154,1155,1319,1324
	Retired codes: 140,170,420,440,450,460,480,520,530,711,750,920,925,950,1110,1120,1130,1140,1235,1261,1275,1350,1355,1410,1420, 1430,1510,1530,1550
March 2025	0826 – New code
	1264 – Updated scope, description, total retention
May 2025	0880 – Updated retention

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