

Issuing and De-Commissioning of Forms	
Adopted: November 24, 2004	Last Reviewed/Revised: February 5, 2024
Next Scheduled Review: 2026-2027	
Associated Policies & Procedures: I-02 Records and Information Management VI-82 Records Information Management	

Purpose

To establish a protocol regulating the administrative approval, issuing and de-commissioning of forms for the purpose of ensuring compliance with the Education Act, the Municipal Freedom of Information and Protection of Privacy Act, and Halton Catholic District School Board (HCDSB) risk management practices.

Application and Scope

This procedure applies to the approval, issuing and de-commissioning of any electronic or paper form used by any department of the HCDSB for any purpose.

A form designed for informal and intra-departmental use and which is not subject to the requirements of the Education Act, the Municipal Freedom of Information and Protection of Privacy Act is exempted from this procedure.

References

Education Act

Municipal Freedom of Information and Protection of Privacy Act (MFIPPA)

Requirements

HCDSB administrators and Supervisory Officers are responsible for all aspects of the forms used under their respective jurisdictions.

Only policy documents are posted on the HCDSB's internet site. All other forms and documents are posted on the employee *StaffNet* site.

The Creation, Issuing and Approval of Forms

The creation, issuing and approval of forms will follow these steps:

- A department administrator or Supervisory Officer will assign staff to draft, according to the departmental form template, a form for a particular purpose;
- The Supervisory Officer will evaluate form drafts for compliance with the Education Act and Municipal Freedom of Information and Protection of Privacy Act or any other statute applicable to the functions of the form, as required. If required, the form will be sent to a HCDSB legal advisor for a response (See Appendix A);
- If an electronic form is web-based (i.e. a form that uses a browser) and/or requires a series of complex processing steps, submit a Help Desk Ticket. IT will assign the ticket to qualified IT resource, who will assess the requirements and develop a solution. Depending on the requirements, the solution may take up to 30 days or longer
- The revisions of the draft form stipulated by the Supervisory Officer will be incorporated by staff into the second form draft;
- The revised form draft will be re-evaluated by the Supervisory Officer and approved for on-line posting;
- The approved form is sent electronically to the designated Information Technology staff who, in consultation with the originating administrator or Supervisory Officer, determines if the software used in processing the form for posting online is appropriate or if conversion to different software is desirable;
- The form is posted electronically as appropriate by the designated Information Technology staff after being assigned a catalogue number or code;
- The designated Information Technology staff will enter the posting date on the **ORDER FOR POSTING** and return it to the originating Supervisory Officer. This **ORDER** is to be retained on file in the office of the Supervisory Officer;
- Those in the HCDSB who are to employ the form will receive appropriate information or in-service regarding the form as ordered by the Supervisory Officer.

Approval for De-commissioning and the De-commissioning of a Form

The approval for and de-commissioning of a form will follow these steps:

- A department administrator or Supervisory Officer will, when necessary:
 - assign staff to report on the use and utility of a given form; or
 - will move to de-commission any form or forms when changes in legislation and/or liability risk require it; or
 - will approve removal of any form that is no longer useful or worth revising.

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- The Supervisory Officer will send a signed **DE-COMMISSIONING ORDER** (form attached) to the designated Information Technology staff who will remove the form from posting and its catalogue number or code from the appropriate catalogue or index;
- Once removed from posting, the designated Information Technology staff will return the **DE-COMMISSIONING ORDER** to the Supervisory Officer stipulating the date on which removal from posting took place;
- The responsible Supervisory Officer will issue notice to those in the HCDSB who may have used the form that the form is no longer available or approved for use. Both the **DE-COMMISSIONING ORDER** and the notice to the HCDSB terminating the form are kept on file at the HCDSB office.

APPROVED: Regular Meeting of the Administrative Council

AUTHORIZED BY: _____
Director of Education and Secretary of the Board



FORMS MANAGEMENT SYSTEM

ORDERS PERTAINING TO HCDSB FORMS

A. ORDER FOR POSTING

1. The attached form bears the name or title of: _____
2. This form is issued under the authority and approval of Supervisory Office named here:

_____ Date: ____/____/____
Name Day Month Year

3. Please electronically **post** this form on the appropriate HCDSB computer accessible site as designated here by initial of the Superintendent:

[] HCDSB **Public Web** site [] HCDSB **StaffNet** site

4. Enter and sign the date and time when this form is posted on the above-mentioned site:

Posted by: _____ ____/____/____ Time: ____ : ____ a.m./ p.m.
Name Day Month Year

Return a copy of this form to the person named in #2 above.

B. DE-COMMISSIONING ORDER

1. The attached form bears the name of title of: _____
2. This form is being de-commissioned under the authority and approval of Supervisory Officer named here:

_____ Date: ____/____/____
Name Day Month Year

3. Please electronically remove this form from posting on the appropriate HCDSB computer accessible site as designated here by initial of the Superintendent:

[] HCDSB **Public Web** site [] HCDSB **StaffNet** site

4. Enter and sign the date and time when this form was removed from posting on the above mentioned site:

Removed from posting by:

_____ / _____ / _____ Time: ____ : ____ a.m./p.m.
Name Day Month Year

Return a copy of this form to the person named in #2 above.

February 2024