



University of Saskatchewan Retention and Disposition Schedules

Continuing Medical Education Program and Administration Records

Record Schedule Number: 2022-003

Office of Primary Responsibility: Continuing Medical Education (College of Medicine)

LEGAL HOLD: If there is litigation or threatened litigation, all potentially relevant records must be preserved until the hold is released on the authority of the Vice-President (Finance and Resources).

The records in this series document the programming and educational activities of Continuing Medical Education.

Records in this series may include:

- Completed conflict of interest forms
- Application and enrolment records including applications, registration, assessments, assignments, attendance, etc.
- Records of participant completion, including certificates issued
- Completed consent forms for release of information
- Completed consent forms for use of recordings
- Contracts with individuals and organizations involved in delivery of programming
- Contracts with sponsors and funders
- Educational materials including recordings, course packages, presentations, online course modules, etc.
- Promotional materials including brochures, posters, graphics, logos, etc.
- Physician remediation records

Record	Trigger	Retention	Disposition
Completed conflict of interest forms	Completion of applicable accreditation cycle, as defined below	T + 1 year	Destroy
Application and enrolment records	Completion of applicable accreditation cycle, as defined below	T + 1 year	Destroy

Applications – not selected	Completion of applicable accreditation cycle, as defined below	T + 1 year	Destroy
Records of participant completion	Completion of applicable accreditation cycle, as defined below	T + 1 year	Destroy
Consent forms – release of information	Completion of applicable accreditation cycle, as defined below	T + 1 year	Destroy
Consent forms – use of recordings	Completion of applicable accreditation cycle, as defined below	T + 1 year	Transfer to Archives for selective retention (archival appraisal)
Contracts for delivery of programming	Completion of applicable accreditation cycle, as defined below	T + 1 year*	Destroy
Contracts with sponsors and funders	Completion of applicable accreditation cycle, as defined below	T + 1 year*	Destroy
Educational materials	Completion of applicable accreditation cycle, as defined below	T + 1 year	Transfer to Archives for selective retention (archival appraisal)
Promotional material	Completion of applicable accreditation cycle, as defined below	T + 1 year	Transfer to Archives for selective retention (archival appraisal)
Physician remediation records (CME's copy of the official records)	Date training completed	T + 7 years	Destroy

T = trigger

*overrides general schedules for procurement contracts and financial records

Accreditation cycle applicable to retention of records:

Retained for a minimum of 7 years and retained between 10-year accreditation site visits until the completion of the report and responses. That is, the records from all educational programming that occur since the previous site visit needed to be retained until after the subsequent visit (10 years later) and the resulting reports and responses are completed (1-2 years longer than the 10-year cycle). If this accreditation cycle is shorter for a given set of records, those records will be retained for 7 years.

Retention rationale:

The retention period is mandated by the accreditation body (Committee on Accreditation of Continuing Medical Education) governing the Continuing Medical Education office in the College of Medicine. The Archives will select records documenting CME's educational programming.

Physician remediation records are not part of the accreditation records; basic 7-year retention period is consistent with standard requirements for financial and other records.

Access to this series is restricted, subject to the Freedom of Information and Protection of Privacy Policy and the Data Management Policy.

Definition of Destroy:

Destruction of records in hard copy format must be by shredding, pulping or incineration. Digital records must be deleted in such a way that recovery is not possible.

Functions:

- Teaching

Data classification: Limited / Restricted

Approval Date: 6 September 2023