



McGill University Classification Plan

McGill University Archives
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Introduction

The McGill University Classification Plan is a university-wide hierarchical and logical structure consisting of headings that represent the institution's activities. The plan allows for the classification, filing and identification of documents produced or received by the University, whatever their medium. Each heading has a code and a title.

Objectives and benefits

The main objectives for implementing the McGill University Classification Plan are:

Facilitate the organization, use and tracking of documents produced and received by the University's various academic and administrative units;

Facilitate decision-making and day-to-day work using a uniform classification and filing system, allowing for efficient tracking of documents and files throughout their life cycle, regardless of medium (paper, hard drive, server, USB key, etc.);

stipulates that organizations submitted to it must publish a classification plan of their documents on their website.

Components of the classification plan

The Classification Plan consists of 12 series, primarily based on the University's missions (e.g., teaching, research, etc.) and on management activities that support these missions (e.g., personnel management, financial management, etc.). The series are broken down into subseries, divisions and ultimately subdivisions.

| | |
|---------------------------------------|----------------------------------|
| 01 ADMINISTRATION AND MANAGEMENT | 07 COMMUNICATIONS AND RELATIONS |
| 02 LEGAL AFFAIRS | 08 ACADEMIC AFFAIRS AND TEACHING |
| 03 FINANCIAL RESOURCES MANAGEMENT | 09 STUDENT AFFAIRS |
| 04 HUMAN RESOURCES MANAGEMENT | 10 RESEARCH AND INNOVATION |
| 05 FACILITIES AND MATERIAL MANAGEMENT | 11 |

01 ADMINISTRATION AND MANAGEMENT

This series includes

01-04-01 Authority and Mandate
This division

02-01-01 External Legal Opinions

This division includes files relating to the management of legal opinions and advice issued by an external body.

02-01-02 Internal Legal Opinions

This divisions includes files relating to the management of legal opinions and advice issued by Legal Affairs to units or for litigation involving the University.

02-02 Legal Procedures

This subseries includes the management of complaints and mediation as well as disputes or litigation resulting in trials.

02-02-01 Trials (disputes or litigation)

This division includes files relating to the preparation, process, hearing and management of

03-03-01 Charts of Accounts

This division includes files relating to the administration of the Charts of Accounts or FOAPALs used for analysis, planning and budgeting of revenues and expenditures as well as assets and liabilities.

03-03-02 Accounts Payables

This division includes files relating to the administration and management of accounts payable and expense reimbursement or advances, such as the authorization process of expenses, internal and external billings and charges, vendor and supplier accounts management, travel expenses reports and reimbursements.

03-03-03 Accounts Receivables

This division includes files relating to the management of accounts receivable and receipt of monies owing to the University. This may be either in the general accounts or individual accounts. Student accounts that are classified under 03-03-04.

03-03-04 Student Accounts

This division includes files relating to the management of student accounts including charges, fines and fees, and account adjustments.

03-03-05 Journals and Ledgers

This division includes files relating to the business transactions and accounting of the University, including the posting of the transactions into the journals and the subsequent financial statements generated for each reporting period.

03-04 Banking Operations

This subseries includes the administration of bank accounts and transactions as well as the management of credit cards and procurement cards.

03-04-01 Bank Accounts

This division includes files relating to

03-05 Fiscal Management (Taxes and Fiscal Receipts)

This subseries includes the management of taxes and tax receipts either issued or received by the University.

03-05-01 Taxes

This division includes files relating to the fiscal management of general taxes for the University as an institution and public body. Personal income tax, tuition and education credit certificate are classified under 03-06-04.

03-05-02 Tax Receipts

This division includes files relating to the issuance and management of tax receipts for monies received or issued by the University and may include tax receipts issued for gifts in kind or similar for donations to the University (as classified under 03-05-01).

03-06 Payroll Management

This subseries includes the administration and management of payroll functions, including timesheets, deductions, pay deposits and the production of income tax slips.

03-06-01 Worked Hours



05-01 Facilities and Land

This subseries includes the stewardship and financial sustainability of buildings and grounds, building operations and both minor and major renovation and construction projects through the planning of University lands, facilities, infrastructure and related property matters.

05-01-01 Acquisition and Leasing

This division includes files relating to the planning, review and approval of the acquisition and disposition of land and buildings, as well as related leasing and permits of immovable property.

05-01-02 Construction and Major Renovation

This division includes files relating to the management of construction and major renovation projects as

05-02-03 Materials and Supplies Disposal

This division includes files relating to the management of the materials and supplies disposal, such as office or lab equipment, furniture and related materials. Hazardous materials are classified under 05-03-06.

05-02-04 Vehicle Management

This division includes files relating to the management of the fleet vehicles for the University, including the distribution of vehicles, inspections, maintenance, mileage, registration and licensing (plates).

05-02-05 Security Equipment

This division includes files relating to the management of security equipment used across campus.

05-03 Facilities Security and Environmental Protection

This subseries includes the management and administration of the security and environmental protection for creating and maintaining a safe and environmentally sustainable campus for students, staff, faculty and visitors. Lost and found is also included in this subseries.

05-03-01 Emergency and Safety Plans

This division includes files relating to the administration and implementation of programs and standards for emergency management such as the University Emergency Response Plan and the Emergency Operations Centre.

05-03-02 Security and Access Management

This division includes files relating to the management of access requests to the campuses and their buildings. It may also include unlawful access and the removal of persons or items from the properties.

05-03-03 Security Logs

This division includes files relating to the management of security patrol logs and security observations or requests.

05-03-04 Security Investigations

This division includes files relating to the management of security investigations and criminal incidents.

05-03-05 Lost and Found

This division includes files relating to the registration and management of items lost on campus.

05-03-06 Hazardous Materials Management

This division includes files relating to the management, storage and disposal of hazardous materials and the tracking and certification of laboratory supplies.

05-03-07 Sustainable Development

This division includes files relating to the planning, implementation and management of sustainable initiatives and programming as well as environmental protection analysis.

05-04 Risk Management and Insurances

This subseries includes the promotion and advancement of risk management practices to protect human and physical resources and minimize the adverse effects should a loss occur.

05-04-01 Risk Management Analysis

This division includes the files relating to the analysis and ranking of risks and managing their effects.

05-04-02 Insurances

This division includes files relating to the management and processing of claims for automobile, property, and building and contents, as well as coordinating claims with insurance companies and external institutions and government agencies.

05-05 Ancillary Services

This subseries includes the administration and management of commercial, retail and support services for the University.

05-05-01 Retail Services

This division includes files relating to the management of retail services such as campus retail stores and university book press as well as any retail services provided by units to the McGill University community and the general public.

05-05-02 Internal Mail

This division includes files relating to the management of internal mail services such as reception of mail, sorting and delivery within McGill University.

05-05-03 Printing Services

This division includes files relating to the management of stationary and custom printing services for McGill community.

05-05-04 Parking Services

This division includes files relating to the administration and management of transportation and parking services.

gifts, such as bequests and planned giving and philanthropic contributions to the University.

07-05 Media relations

This subseries includes the management of media relations for the University to promote and disseminate newsworthy events and activities, as well as any other stories of broader interest to the public. It also includes the management of the University's main social media accounts and media or press inquiries.

07-05-01 Communications with Press

This division includes files relating to the management of press communications as well as emergency notifications,

07-08-04 External Relations with Units

This division includes files relating to the administration and management of the external associations of a unit, department or faculty. The associations may be

08-02-03 Accreditation and Certification

This division includes files relating to the management of processes for the validation and certification for evaluating faculties, schools and centres. are evaluated. This includes the accreditation of new faculties, schools or centres and the renewals of those previously accredited. The accreditation or certification other institutions or for other units within McGill University are classified under 07-08-03 and 07-08-04, respectively.

08-03 Teaching Management

This subseries includes the administration and management of the teaching schedules, duties and responsibilities, evaluation and support tools to aid in pedagogy.

08-03-01 Semester Organization

This division includes files relating to the development of timetables and schedules for courses offered each semester.

08-03-02 Teaching Duties

This division includes files relating to the distribution of teaching duties and workloads assigned to faculty.

08-03-03 Teaching Evaluations

This division includes files relating to the administration of teaching evaluations completed by students for each of their courses.

08-03-04 Teaching Support Tools

This division includes files relating to the management of teaching aids and materials to support course lectures and presentations.

08-06-

09-01-03

09-06 Student Rights and Responsibilities

This subseries includes the management of student rights and responsibilities as outlined in the student handbook.

09-06-01 Student Rights and Responsibilities

This division includes files relating to the management of student rights and responsibilities.

09-07 Student Files

This subseries includes the management of the student file.

09-07-01 Student Files

This division includes files relating to the management and documentation of the student's academic progress and career while attending the university.

Note Some record types from Admission, Registration, Equivalencies and Graduation may be transferred to the Student File

10-02-02 External Funding Programs

This division includes files relating to the management and documentation of external programs for funding research such as government, industry or corporate sponsorship and partnership.

10-03 Research Centres and Related Units

This subseries includes the administration and management of formally approved research organizations, centres, units, laboratories, field stations and networks for conducting research, promoting innovation and advancing scholarly activities through collaborative research and training.

10-03-

10-04-02 Research Files

This division includes files relating to the management of research projects and operating procedures, protocols or guidelines as well as shadow files (clinical trials) and outcomes of the research. It excludes the research data.

10-04-03 Ethics and Integrity Reviews

This division includes files relating to the management of public funds, research ethics reviews for projects involving human participants or animals as well as radioactive or biohazardous materials.

11 AFFILIATIONS AND PARTNERSHIPS

This series includes the management of affiliations and partnerships with local, national and international schools or colleges that operate independently with a collaborative, formal agreement with McGill as well as affiliations with the three levels of government.

11-01 National Affiliations and Partnerships

This subseries includes the management of affiliations with schools and colleges across Canada, and with all three levels of government.

11-01-01 Non-government Affiliations and Partnerships

This division includes files relating to the management of affiliations and partnerships between schools, CEGEPS, colleges and other universities located within Quebec and Canada.

11-01-02 Government Affiliations and Partnerships

This division includes files relating to the management of affiliations and partnerships between municipal, provincial and national governments and McGill

11-02 International Affiliations and Partnerships

This subseries includes the management of affiliations with schools and colleges outside of Canada and with international governments.

11-02-01 Non-government Affiliations and Partnerships

This division includes files relating to the management of affiliations and partnerships between schools, colleges and other universities located outside of Canada.

11-02-02 Government Affiliations and Partnerships

This division includes files relating to the management of affiliations and partnerships between international governments and McGill.

12 SERVICES TO THE COMMUNITY

This series includes the management of various services offered to the McGill community and the general public, such as student services, campus life, athletics and recreation, professional medical and dental services and alumni services. These services range from social and cultural, financial, educational, professional to

12-01-08 Food and Dining

This division includes files relating to the management of voluntary and mandatory meal plans offered at the University, such as the oneCard plan.

12-02 Campus Life

This subseries includes the management of services for students' academic success and development through social and cultural activities and special events. Clubs, associations and societies also form part of campus life.

12-02-01 Student Associations, Clubs and Societies

This division includes files relating to the administrative relationship of student associations, clubs and societies with the University

12-02-02 Social and Cultural Activities and Services

This division includes files relating to the management of cultural and social programming, such as public art and Indigenous cultural programming.

12-02-03 Engagement in the Community and Special Events

This division includes files relating to the management of social, cultural or sports activities organized or held by the University in which the general public are invited to attend or participate, such as the campus farm tours, book fairs and public astro night lectures.

12-03 Athletics and Recreation

This subseries includes the administration and management of physical activities and programs, staff fitness, varsity and recreational or intercollegiate sports as well as the management of the client files for fitness centres and children's sports camps.

12-03-01 Facilities and Services

This division includes files relating to the administration and management of the various facilities and services provided for students and staff.

12-03-02 Client Files

This division includes files relating to the management of client files and memberships for the use of the athletic facilities and recreational services.

12-03-03 Varsity Sports

This division includes files relating to the management of varsity teams including travel and competitions.

12-03-04 Students Athletics Program and Intramurals

This division includes files relating to the administration and management of student athletics programs such as clubs, fitness and athletics groups, competitive and recreational intramural sports.

12-03-05 Staff Fitness Programs

This division includes files relating to the management of the staff fitness program offered to McGill University staff and faculty.

12-03-06 Children's Programs and Camps

This division includes files relating to the management of animation and educational activities, individual and group lessons, day camps and workshops for children and participating schools.

12-04 Health, Dental and Wellness Professional Services

This subseries includes the administration and management of professional health and wellness services offered to McGill students, staff, faculty and the general public. The professional services include medical, dental, psychological counselling and physiotherapy and sports therapy.

12-04-01 Medical Health Services

This division includes files relating to the administration and management of patient files held by McGill University health services.

12-04-02 Dental Clinics

This division includes files relating to the administration and management of patient files held by McGill University dental clinics.

12-04-03 Counselling Services

This division includes files relating to the administration and management of patient files held by McGill University counselling services.

12-04-04 Physio Services

This division includes files relating to the administration and management of patient files held by the physical and occupational therapists and sports physiological therapy clinics.

12-05 Alumni Services

This subseries includes the management of services provided to McGill University's alumni, including networks, chapters, and community programs.

12-05-01 Associations Management

This division includes files relating to the management of alumni chapters and their activities as well as programs and promotional offers or discounts.

